PointOS®

PROFESSIONAL

Manager Manual

Table of Contents

Introduction

Overview

PointOS Professional is a Point Of Sale (POS) software specifically designed to give any size bar, club, or restaurant all of the tools it needs in a bar POS or restaurant POS at an affordable price. With integrated credit cards, inventory tracking, customer tracking, full reporting, and an easy-to use interface, PointOS is a touch screen POS that will save you time and money.

Features

Professional Main Features

- Runs on Windows XP, Vista, or Windows 7
- Touch Screen Operated
- Easy to Learn and Use
- Food/Liquor Inventory Control
- Free Tech Support
- Works With QuickBooks©

Point Of Sale Features

- Simple Order Entry Screens
- Delivery with Caller ID
- Integrated Credit Cards
- Gift Cards and Personal Checks
- Multiple Servers on One Station
- Print to Kitchen or Service Bar
- Order, Transfers, Splits and Combines
- Employee Time Card System
- UPC Bar Code Scanning
- Server Cash Accountability
- Item and Check Discounting
- Automatic Happy Hour Pricing
- Preset, Forced, and Custom Modifiers
- Customer Tabs and Order Tracking
- Server/Cash Drawer Stations
- Employee Email System
- Employee/VIP Discounting
- Categorized Payouts
- Print Item Recipes from Order Entry
- Cash Drawer Transfers
- Room Setup with Table Layout
- Open and Closing Reports
- Incident Reports
- Manual Customer Info/Email Entry

Back Office Features

- System Dashboard
- Integrated Online Help
- Auto Archiving And Maintenance
- Customizable Security Settings
- Tax Reporting
- Export Reports To Excel
- Auto Email Reports
- Customer Maintenance
- Credit Card Batch Scheduling
- Employee/Entertainment Scheduling
- Payroll Reports
- Inventory Shopping List
- Par Inventory Recommendations
- Send Customer Newsletter

Integrated Music System

- Touch Screen Music Player
- Request Songs From Any Station
- Windows Media Player Integration
- Multiple Playlists
- Customer Songs Auto Added
- Auto Find Music
- Print Song Lists

Optional ID Scanning

- Driver’s License Scanning For Age Verification
- Customer Song Lists
- Quick Customer Adding
- Customer Sales Tracking
- Age Appropriate Order Entry Screen
- Pictures on Customer Tabs
- Customer Profiles/Notes

System Requirements

Minimum Requirements

- Windows XP SP3, Vista, or Windows 7
- 256 MB Ram

Multi-Station Server Requirements

- Do Not Use XP Home/Vista Home Basic

Recommended Hardware (optional)

- Touch Screen Monitor
- Receipt Printer
- MMF Cash Drawer

For Bar Code Scanning (optional)

- Bar Code Reader

For ID Verification (optional)

- Scan Shell (hardware only)

For Credit Cards (optional)

- Merchant Warehouse Account
- Magnetic Strip Reader

Software (optional)

- QuickBooks© (Not QB POS)

Manager Manual Conventions

This manual provides information on using the screens in the *Manager Dashboard* and Manager Menus of PointOS Professional.

The conventions include using **bold** face for interactions with menus or fields on a screen. The manual also uses *italics* to indicate screen names.

The Manager Manual is organized by menu from the *Manager Dashboard*.

Getting Started

Overview of Installation and New Install Process

After you download the PointOS software, you will install the software. The Installation Process is simplified by the InstallAware Wizard.

Then, the PointOS software will guide you through the following steps of the new install process:

- Select Database (optionally Create New or Choose one from the server, depending on type of install)
- Name Station
- Printer Setup
- Main Setup (for server install)
- Create Employees (for server install)

After you have completed these steps, you can begin using PointOS Professional.

NOTE: You can install multiple stations of PointOS. Refer to the " Up Multiple Stations" section in this Manager Manual for more information.

Installation

When you begin the installation process, the system begins the PointOS Professional InstallAware Wizard. Follow the on screen prompts to install PointOS Professional. As part of the installation, the system prompts you to select the Setup Type.

Figure 1: Install Aware Wizard Setup Type

- For the computer station that will act as your server, select **Client and Server**.
- For all other stations, select **Client Only**.

To install PointOS Door Manager, check the **Add DoorMan Client** box.

Continue to follow the on screen prompts to complete the installation and registration process.

Select A Database

When you start PointOS Professional for the first time on the computer station being used as a server, the system prompts you to select a database.

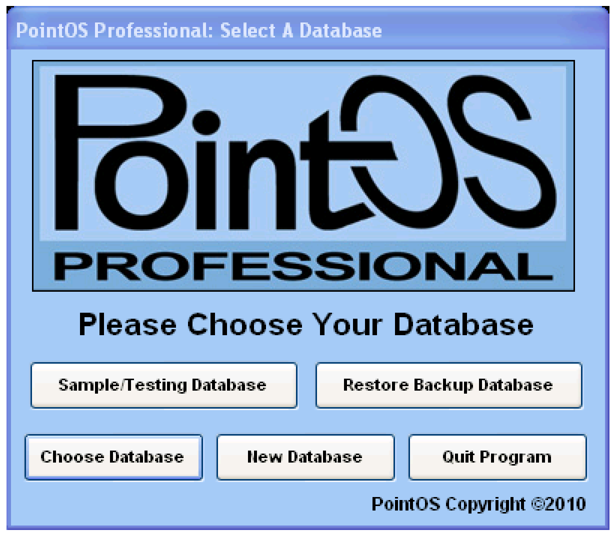


Figure 2: Select a Database

Select one of the following options or select **Quit Program** to close PointOS:

- **Sample/Testing Database -** a sample database in the Demo version of the software to try out the software
- **Choose Database -** to select an existing database from the server
- **New Database -** to create a new database

Choose Database and New Database are discussed later in this chapter.

You can also select **Restore Backup Database** to open the *Restore Backup Database* screen.

NOTE: Restoring the database is intended for emergency recovery of data only.

Select **Quit Program** to close PointOS.

Choose Database

When you start a station installed as Client Only for the first time, the system prompts you to choose a database.

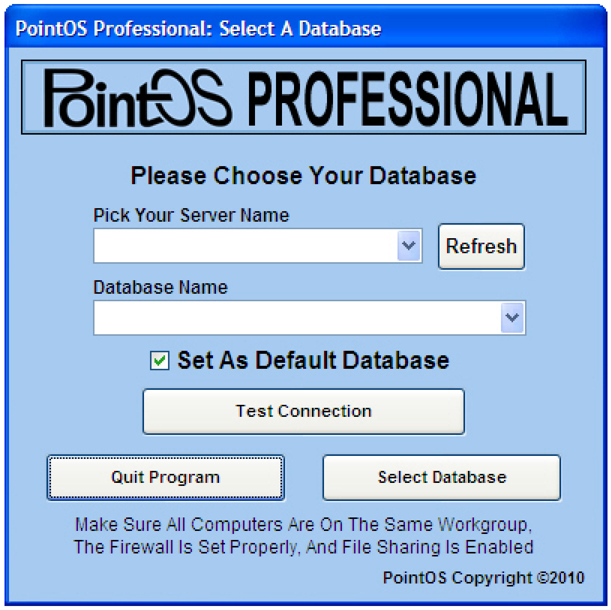


Figure 3: Select A Database - Choose Database

1. First, select the computer used as a server on your network from the **Pick Your Server Name** drop down list. If the computer names are not listed, select **Refresh**.
2. Select the database name from the **Database Name** drop down list.

NOTE: All stations can access the same database.

3. Check the **Set as Default Database** box to use this database as the default database.
4. Select **Test Connection** to check the connection to the selected database.
5. Select the **Select Database** option to continue or select **Quit Program** to close PointOS.

Troubleshooting

If the computer name does not appear on the list of servers, try the following:

- Reboot all network computers.
- Make sure all computers are on the same workgroup.
- Enable File Sharing on the database computer and give access rights to all workstations.
- Make sure you are not running any antivirus programs that would block your computers from seeing SQL Server on the shared database computer.

New Database

1. To start a new database, select **New Database** from the *Select a Database* screen. The system displays the *Choose New Database* screen.

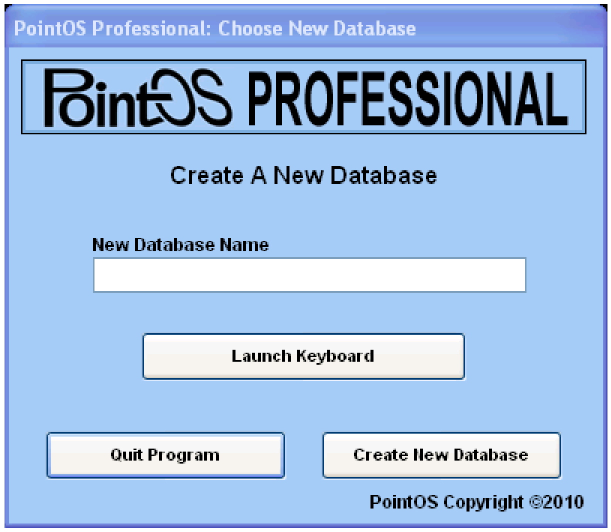


Figure 4: Create a New Database

2. Enter the **New Database Name**. To use the touch-screen keyboard, select **Launch Keyboard**.
3. Select **Create New Database** or select **Quit Program** to close PointOS.

The system continues with the new station setup process.

Name Station

When you open PointOS Professional on a station for the first time, the system prompts you to name the station.

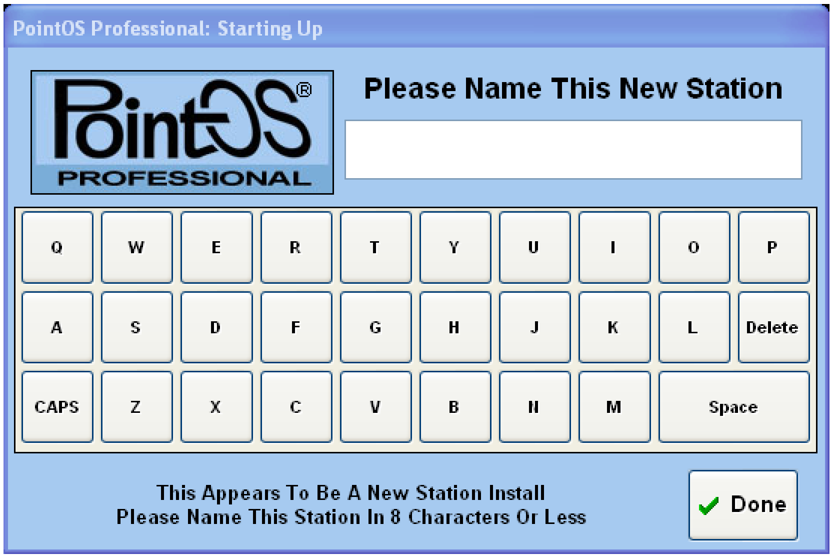


Figure 5: Name Station

1. Enter the name for this station. The station name must be unique on the network, but can be anything you like. It should be descriptive of where the station is located, such as Upfront, Back Bar, or Office. It must be 8 characters or less.

NOTE: The system automatically adds a station number.

2. Select **Done**.

Main Setup

The system displays an alert guiding you to complete the *Main Setup* next.

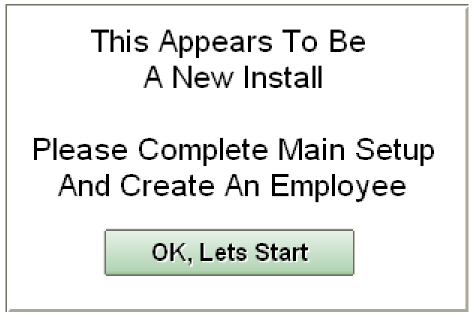


Figure 6: New Installation Alert

1. Select **OK, Lets Start**.

The system displays the *Main Setup* screen.

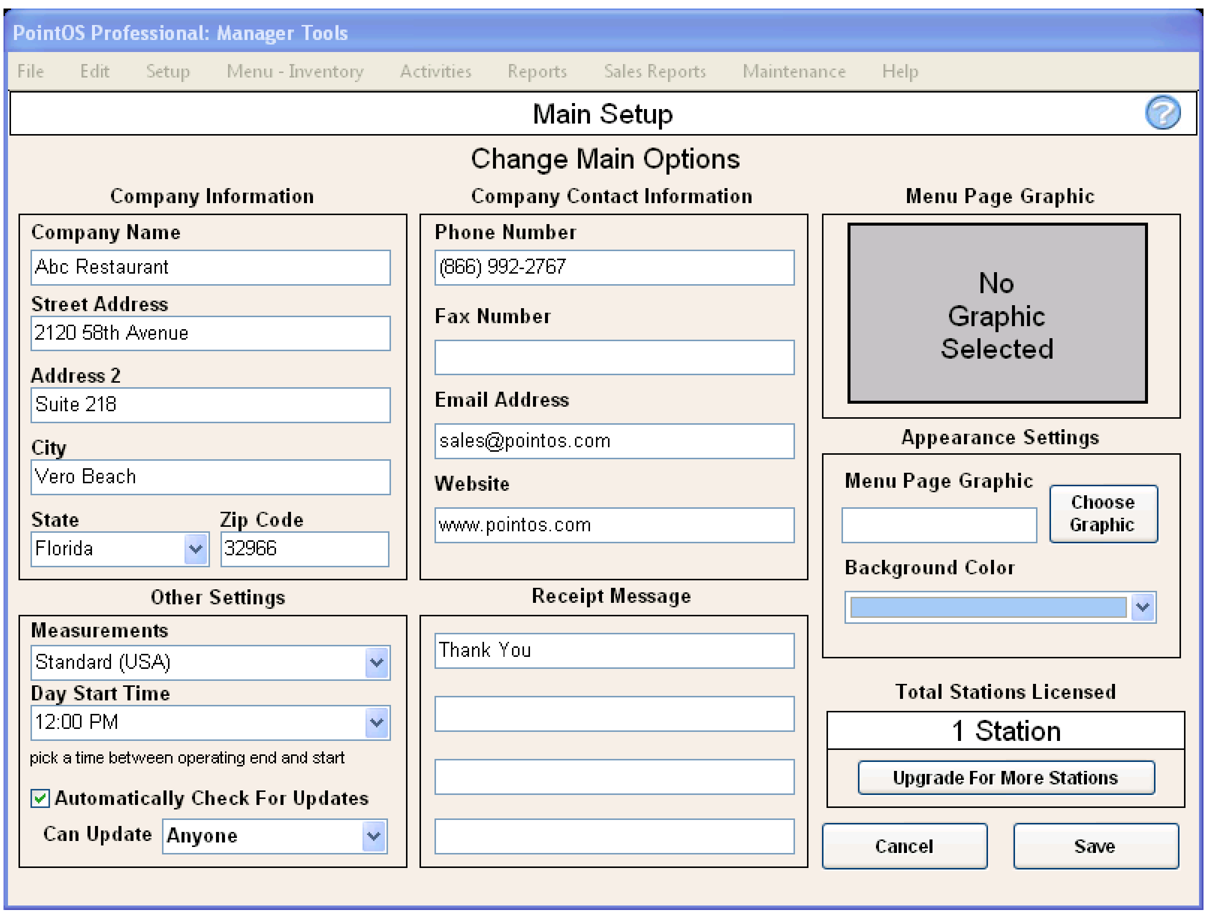


Figure 7: Main Setup Screen

Company Information and Company Contact Information

1. Enter your **Company Information**:
   - Company Name
   - Street Address
   - Address 2
   - City
   - State
   - Zip Code
2. Enter the **Company Contact Information**:
   - Area code and Phone Number (numbers only)
   - Fax Number
   - Contact Email Address (optional)
   - Website address (optional)

Other Settings and Receipt Message

1. From the **Other Settings** area, select either **Standard (USA)** or **Metric** from the **Measurements** drop down list.
2. From the **Other Settings** area, set the Day Start Time. You should select a time when your bar, club, or restaurant is not operating to provide a breaking point between operating days. Refer to the " the Time" section in this Manager Manual for more information about using the system clock.
3. Enter a **Receipt Message** to use as a footer for all printed sales receipts.

Menu Page Graphic and Appearance Settings

1. Make sure you have saved your graphic in jpg format with an image size of 740 x 240 in the Backgrounds folder of your database.
2. Select **Choose Graphic** from the *Appearance Settings* area of the *Main Setup* screen.

The system displays an alert notifying you to make sure your graphic is in the right format and in the correct location. All graphics must be in the shared (network) PointOS Database folder.

3. Select **OK**.

The system opens the *Choose Main Menu Graphic* dialog box, open to the correct location.

4. Choose your graphic and select **Open** or select **Cancel** to return to the *Main Setup* screen.

The system displays the selected graphic in the **Menu Page Graphic** area of the *Main Setup* screen.

5. Select a color to use on the background of the *Menu Page* from the **Background Color** drop down list.

Total Stations Licensed

The system displays the number of stations you currently have licensed with PointOS.

NOTE: The license is concurrent connections to the database. The software can be installed on as many computers as you like, but if you try to connect more than you license, the system displays the Stations Manager screen with a warning instructing you to shut down another station. Refer to the " Manager" section in this Manager Manual for more information.

1. Select **Upgrade For More Stations**.

The system displays the *Upgrade* screen.

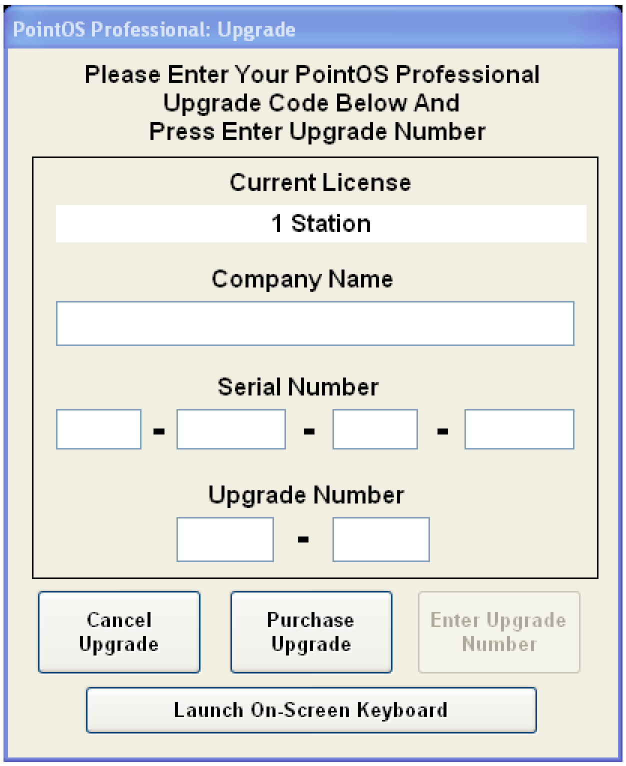


Figure 8: Upgrade Screen

The *Upgrade* screen displays your **Company Name** and **Serial Number**.

2. Either enter your **Upgrade Number**, select **Purchase Upgrade** to go to the PointOS website *Purchase* page, or select **Cancel Upgrade** to close the *Upgrade* screen.
3. After you have entered a valid Upgrade Number, select **Enter Upgrade Number**.

The system displays the new number of stations licensed in the license area.

NOTE: You may purchase an upgrade at any time from ://www.pointos.com.

Save Main Setup

1. Select **Save** to save your *Main Setup* selections, or **Cancel** to close the *Main Setup* screen without saving changes.

The system displays an alert notifying you that *Main Setup* options have been saved.

Employee Setup

The system displays the *Employee Setup* screen next.

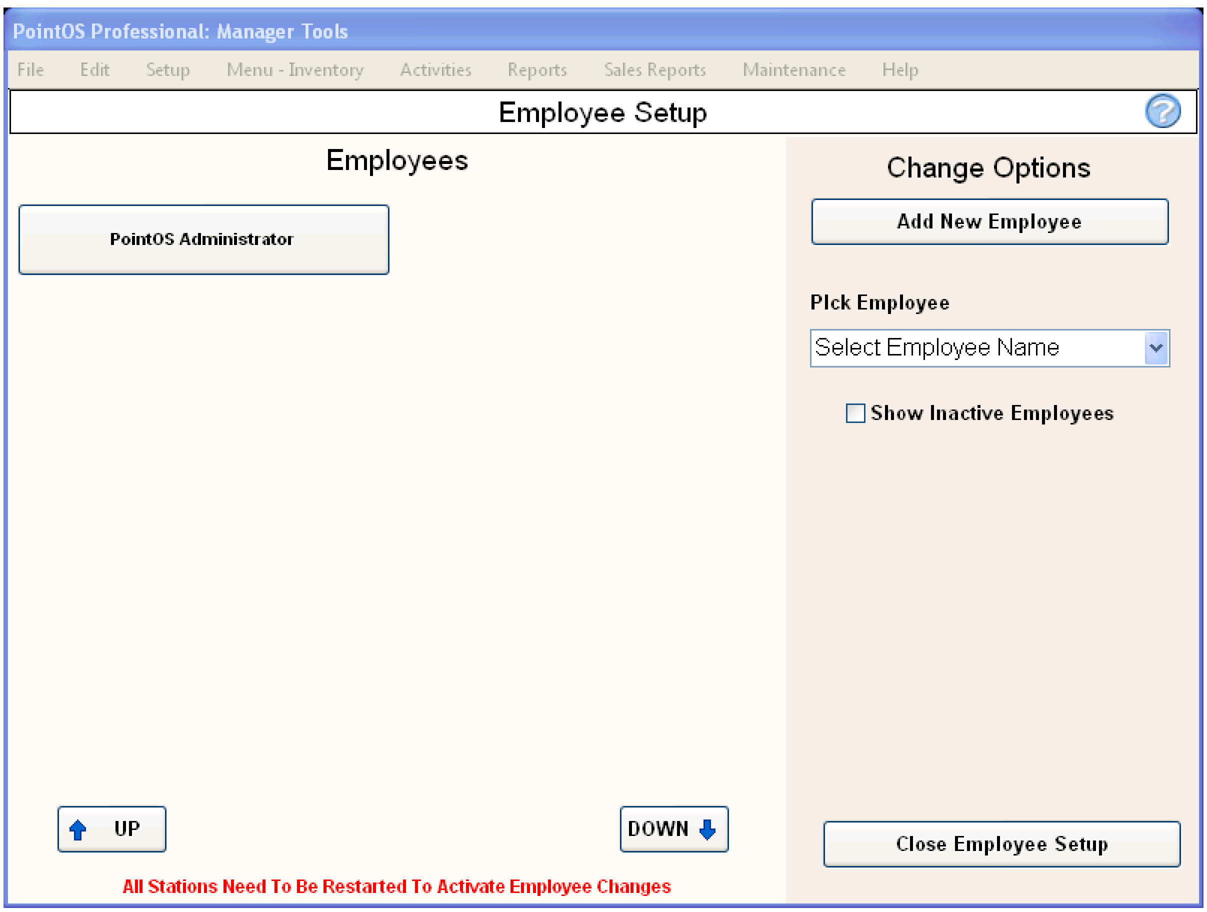


Figure 9: Employee Setup Screen

You can add new employees or change the settings for the default employee - **PointOS Administrator**. Once you have added other employees, you can also change their settings. For all three options, you will use the *Change Employee Options* screen.

1. Select **Add New Employee** from the **Change Options** area to open the *Change Employee Options* screen to create a new employee in the system. Once you have added employees, they are listed in the **Employees** list of the *Employee Setup* screen.
2. Select **PointOS Administrator** from the **Employees** list to open the *Change Employee Options* screen for the PointOS Administrator and change the employee settings. Once you have saved the information, the PointOS Administrator is listed by employee name in the **Employees** list.
3. Select an employee's name from the **Employees** list to open the *Change Employee Options* screen for that employee and change the employee settings.

The employees are listed in the **Employees** list in alphabetical order. Use the **Up** or **Down** arrows to scroll through a long list of employees. For a quick method to scroll to the employee, select the employee's name from the **Pick Employee** drop down list.

4. Check the **Show Inactive Employees** box to include inactive employees in the **Employees** list.

NOTE: You will have to restart all stations to see changes to the **Employees** list.

5. Select **Close Employee Setup** when you have finished.

Change Employee Options

The *Change Employee Options* screen allows you to add new employees or change information for employees you have already added to PointOS.

When you select **Add New Employee** or an employee name, the system displays the *Change Employee Options* screen.

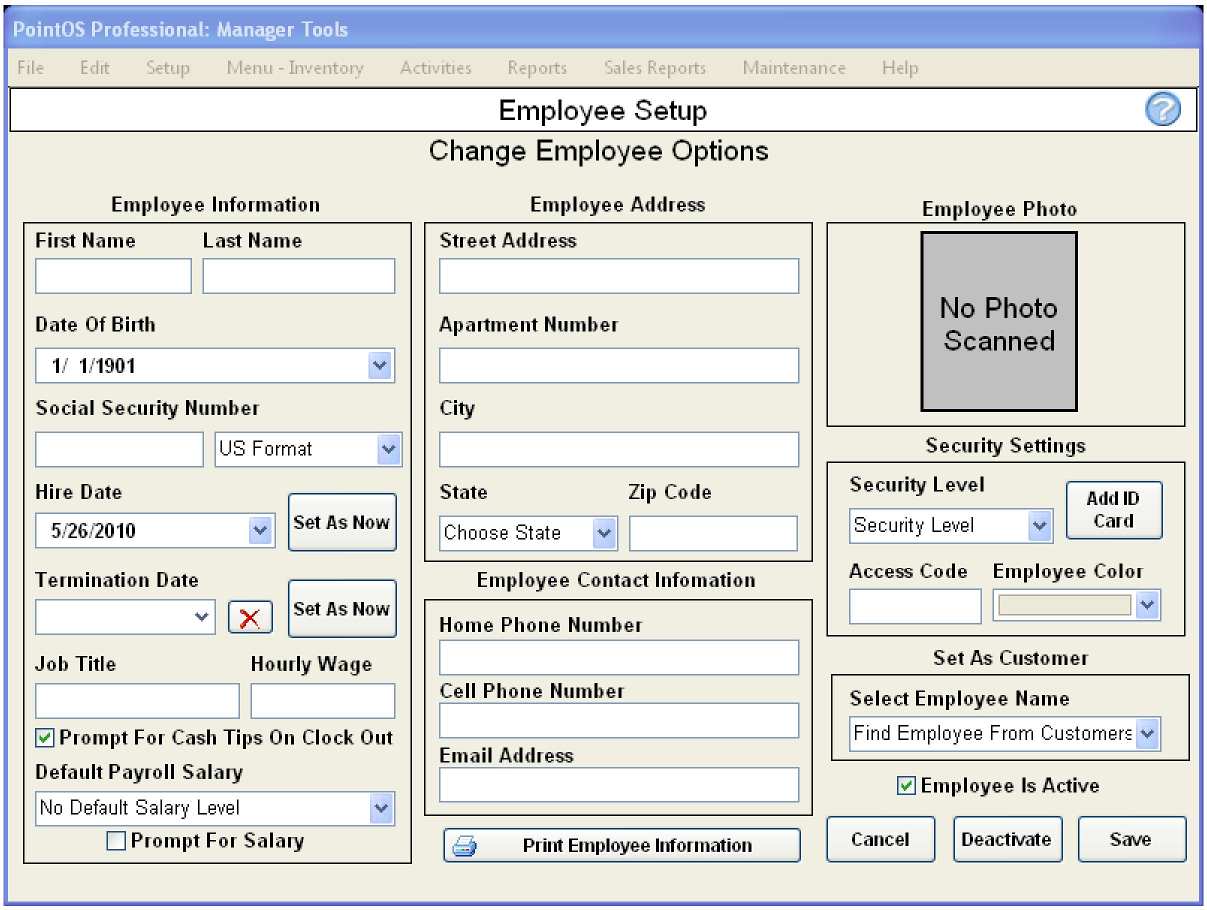


Figure 10: Change Employee Options Screen

1. Enter or update the Employee Information:
   - Enter the employee's **First Name**.
   - Enter the employee's **Last Name**.
   - Enter the employee's **Date of Birth**. You can also use the drop down arrow to select the date from the calendar.
   - Enter the employee's **Hire Date**. You can also use the drop down arrow to select the date from the calendar. Select **Set as Now** to select today's date.
   - When the employee is terminated, enter the employee's **Termination Date**. You can also use the drop down arrow to select the date from the calendar. Select **Set as Now** to select today's date.
   - Enter the employee's **Job Title**.
   - Enter the employee's **Hourly Wage**. This information will show up on payroll reports.
   - To use a default salary level, select the **Default Payroll Salary** drop down arrow. These items are set up on the *Payroll Setup* screen. Refer to the " Setup" section in this Manager Manual for more information.
   - Check the **Prompt for Salary** box to enable multiple job descriptions and hourly rates for this employee. When the employee clocks in, he or she will need to select the appropriate job description, as defined in the *Payroll Setup* screen.
2. Enter or update the Employee Address:
   - Enter the employee's **Street Address**.
   - Enter the employee's **Apartment**.
   - Enter the employee's **City**.
   - Select the employee's **State** from the drop down list.
   - Enter the employee's **Zip Code**.
3. Enter the Employee Contact Information:
   - Enter the employee's **Home Phone Number**.
   - Enter the employee's **Cell Phone Number**.
   - Enter the employee's **Email Address**. If the employee has an email address, he or she can receive messages from the *Message Center*.
4. The **Employee Photo** displays a photo scanned for this employee, if applicable. You must first enter the employee as a customer on the front end *Order Entry -Start New Tab -New Customer* screen and scan his or her ID.
5. Select the employee's security level from the **Security Level** drop down list. The security level allows or prevents the employee from entering certain areas of the system, as defined in the *Security Setup* options. Refer to the " Settings" section in this Manager Manual for more information.

6. To scan a new ID card for the employee, select **Add ID Card**.
   - The system displays the *Add Employee ID Card* screen.
   - Swipe the card in the card reader or select **Do Not Swipe ID Card** to close the *Add Employee ID Card* screen.

NOTE: Key cards should be encoded in the following format: **%12345678?<enter>**

7. Enter the employee's **Access Code**. The access code is a four-digit number, usually the last four digits of the employee's social security number. This number must be unique for use on the system. If the employee's email address is on the system, and you have set up email, the system will email the employee his or her access code.
8. Select an **Employee Color** from the drop down list. This color will surround all that employee's tabs on the Open Tabs screen to allow quick identification of the correct orders.
9. By default, the **Employee is Active** box is checked. Uncheck the **Employee is Active** box to deactivate the employee, or select **Deactivate**. If you are updating an inactive employee, check the **Employee is Active** box to re-activate the employee or select **Activate**.
10. If you have scanned the employee's ID and entered him or her as a customer first, select the employee's name from the **Select Employee Name** drop down list.
11. Select **Save** to save the employee information, or select **Cancel** the *Change Employee Options* screen without saving the information.

Register PointOS

When you have finished your trial of the PointOS Professional System, you must enter your serial number from your purchase to continue using PointOS Professional.

To open the *Registration* screen, select **Enter Serial Number** from the *Trial Mode* screen.

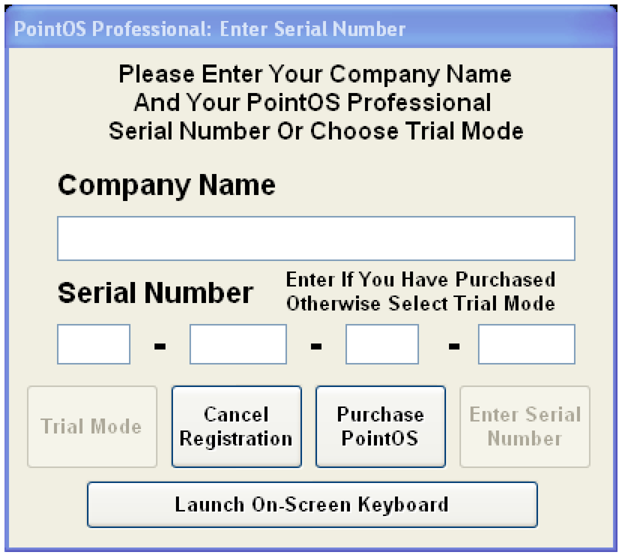


Figure 11: Enter Serial Number Screen

1. Enter your **Company Name**. This must be exactly the same as when you downloaded the software.
2. Enter your **Serial Number**. This is case sensitive.
3. Select **Enter Serial Number**. The system displays a message indicating that the product has been successfully registered. You will need to restart the program. Select **Restart Program** from the message.

NOTE: If you have not yet purchased PointOS Professional, select **Purchase PointOS** to go to the website to complete your purchase.

You can also select **Trial Mode** to continue your trial. Trial Mode is a fully functional, one station license good for 30 days. When you decide to purchase PointOS, you will not lose any data you set up from the trial mode.

Select **Exit Program** to close the program without registering your copy of the software at this time.

Manager Dashboard

This chapter provides an overview to the activities available on the Manager Dashboard, as well as a description and introduction to each item. Most activities are described in detail in other chapters.

Accessing the Manager Dashboard

1. From the *PointOS Main Menu* screen, select **Manager**.

The system displays the *Enter Manager Code* screen.

Figure 12: Enter Manager Code Screen

2. Swipe your card or enter the default Manager code and press **Enter**.

NOTE: All attempts are logged in the Access Report.

The system displays the *Manager Dashboard*.

Overview of the Manager Dashboard

The dashboard provides a quick look at what is going on with the system. It also provides fast access to some of the most commonly used features in PointOS Professional. Think of it as the manager's home base for all that's going on with your bar, club, or restaurant.

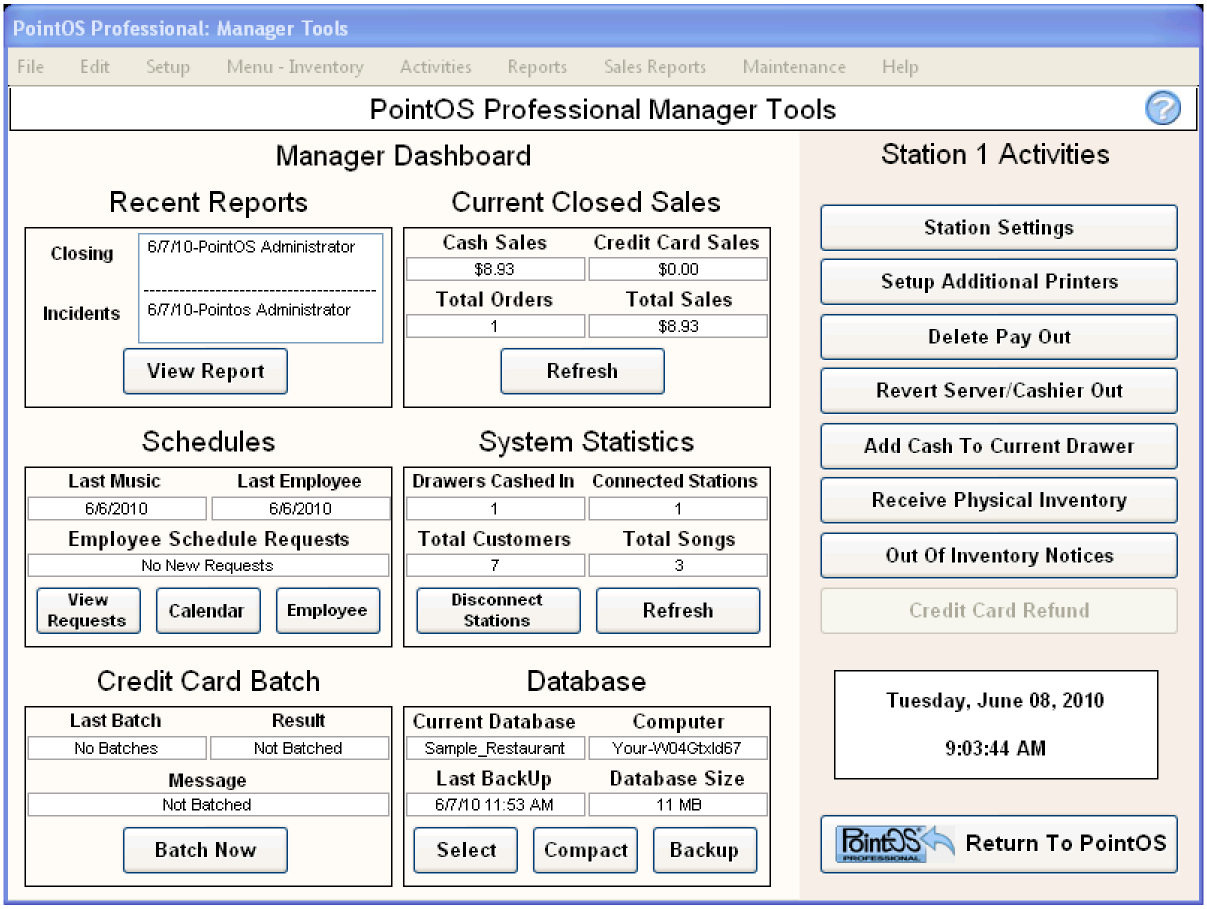


Figure 13: Manager Dashboard

The left side of the screen provides a quick view of the following information, with links to related activities:

- Recent Reports
- Schedules
- Credit Card Batch
- Current Closed Sales
- System Statistics
- Database

The right side of the screen includes links to additional commonly used features in PointOS Professional.

Recent Reports

Recent reports gives you a quick way to view reports that have been submitted by your bartenders or servers. Servers can run a closing report to let you know what has gone on during their shifts. This report includes information about inventory problems, damage, or other information.

A server can also submit a report to describe an incident. This can include fights or medical issues. These reports are valuable for documenting issues and may be a vital tool if you ever end up in court.

View Recent Reports - Closing

1. To view a recent closing report, select the closing report you want to view from the list of reports on the *Manager Dashboard* in the **Recent Reports** area.
2. Select **View Report**.

The system displays the *Closing Reports* screen. Refer to the "Closing Reports" section in this Manager Manual for more information.

View Recent Reports - Incident

1. To view a recent incident report, select the incident report you want to view from the list of reports on the *Manager Dashboard* in the **Recent Reports** area.
2. Select **View Report**.

The system displays the *Incident Reports* screen. Refer to the "Incident Reports" section in this Manager Manual for more information.

Schedules

PointOS allows the manager to create weekly reports for employee, entertainment and specials scheduling. This area will remind you if a weekly report has not been made for one of these areas. This area also notifies you of any employee schedule requests.

View Schedule Requests

To open the *Schedule Requests* screen, select **View Requests** from the **Schedules** area of the *Manager Dashboard*.

The system displays the *Schedule Requests* screen. Refer to the "View Schedule Requests" section in this Manager Manual for more information.

View Calendar

To open the *Calendar* screen, select **Calendar** from the **Schedules** area of the *Manager Dashboard*.

The system displays the *Calendar* screen. Refer to the "Calendar" section in this Manager Manual for more information.

View Employee Schedule

To open the *Employee Schedule* screen, select **Employee** from the **Schedules** area of the *Manager Dashboard*.

The system displays the *Employee Schedule* screen. Refer to the "Employee Schedule" section in this Manager Manual for more information.

Credit Card Batch

If you are using PointOS for credit card batches, this area displays the results of the last credit card batch attempt. Additionally you can perform a one click manual batch from this area.

If you are using Merchant Warehouse, this area will let you know if there are any connection problems.

Batch Now

To open the *Batch Credit Cards* screen, select **Batch Now** from the **Credit Card Batch** area of the Manager Dashboard.

The system displays the *Batch Credit Cards* screen. Refer to the "Batch Credit Cards" section in this Manager Manual for more information.

Current Closed Sales

This gives you a live snapshot of your current sales for the day, not including open orders or voids.

To refresh the current closed sales information, select **Refresh** from the **Current Closed Sales** area of the *Manager Dashboard*.

The system updates the display with the most recent information.

NOTE: Refer to the " Setup" section in this Manager Manual for more information on setting the day start time.

System Statistics

This area shows you several valuable pieces of information about the system:

- Drawers cashed in
- Number of stations connected
- Number of customers
- Number of songs in the system

To update the statistics, select **Refresh**.

Disconnect Stations

This area allows you to quickly disconnect all stations.

To disconnect all stations, select **Disconnect Stations** from the **System Statistics** area of the *Manager Dashboard*.

Database

This area gives you information about your database. You can view the database name, size, and when it was compacted and backed up.

NOTE: We recommend that you backup and compact your database at least once a week.

Select Database

If you need to select a new database (for example, if you have a training database setup for new employees), complete the following steps:

1. Choose **Select** from the **Database** area of the *Manager Dashboard*.
2. The system displays a warning to make sure you want to select a new database. Select **Yes**.

The system restarts PointOS Professional to allow you to select a new database. Refer to "Select A Database" section in this Manager Manual for more information.

Compact Database

If your system is running slow, you can speed it up by compacting the database.

To compact the database, select **Compact** from the **Database** area of the *Manager Dashboard*.

Backup Database

To back up the database, select **Backup** from the **Database** area of the *Manager Dashboard*. Refer to "Backup Database" section in this Manager Manual for more information.

You can also set this to be done automatically. Refer to "Database Setup" section in this Manager Manual for more information.

Station Activities Overview

The **Station Activities** area of the *Manager Dashboard* includes the following activities:

- Station Settings
- Setup Additional Printers
- Delete Pay Out
- Revert Cashier Out
- Add Cash to Current Drawer
- Receive Physical Inventory
- Out of Inventory Notices
- Credit Card Refund
- Return to PointOS

Station Settings

The **Station Settings** are specific to the current station. You can setup or change the station printer as well as other settings specific to the current station.

To view or edit the station settings, complete the following steps:

1. Select **Station Settings** from the **Station Activities** area of the *Manager Dashboard*.

The system displays the **Station Settings** on the right side of the *Manager Dashboard*.

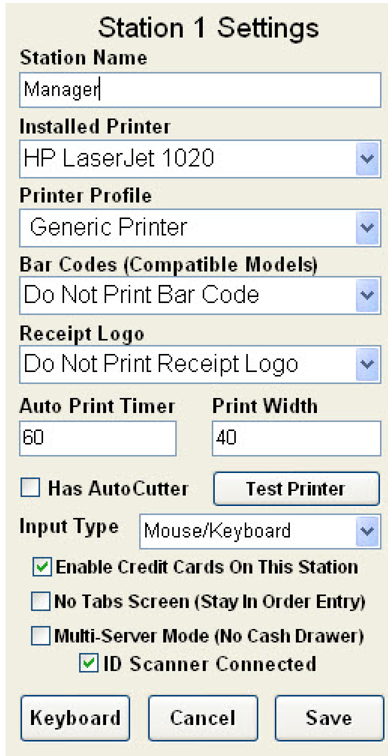


Figure 14: Station Settings on Manager Dashboard Screen

2. Enter the **Station Name**. To use the touch-screen keyboard, select **Keyboard**.
3. To add a receipt printer, select the printer from the **Installed Printer** drop down list.

NOTE: If your printer is not on the list, you will need to add the printer in Windows. Refer to Windows Help for more information on adding a printer. Refer to the " Up a Generic Driver for Receipt Printing" section in this Manager Manual for more information on adding a generic printer.

4. Select the printer name from the **Printer Profile** drop down list. If your model is not on the list, either select **Generic Printer** or a printer with a similar make and model number to the one you have. Newer printers by the same manufacturer often have similar settings.

NOTE: The model is important when using a cash drawer or auto cutting. If you select the incorrect model, your cash drawer may not open. If you cannot find a printer model that works for you, try the advanced printer setup or contact us.

5. If you are using bar codes, select the compatible model from the **Bar Codes** drop down list.
6. To print the company logo on receipts, select the compatible model from the **Receipt Logo** drop down list.

NOTE: Refer to the documentation that came with your printer for more information about uploading a logo to your printer.

7. The default **Auto Print Timer** is 60 seconds. You can change it if necessary.
8. The default **Print Width** is 40. You can change it if necessary. You should make it as large as possible without the test <--------> breaking to a new line.
9. Check the **Has An AutoCutter** box, if your printer auto cuts the paper after printing.
10. Select **Test Printer** print a test page using the current printer settings.
11. Select the method of input from the **Input Type** drop down list.
12. Check the **Enable Credit Cards on this Station** box to allow credit card sales for this station.

NOTE: Credit cards must be enabled in two places: on the *Payment Setup* screen, and on EACH station where credit cards are accepted (some stations may be cash only).

13. Check **No Tabs Screen** to keep this station in order entry mode. It will not show the **Tabs** screen.
14. Check the **Multi-Server Mode** box if there is not a cash drawer attached to this station. This will allow multiple servers to use the station for entering orders. When using Multi-Server mode, there is no cash drawer, payouts, or station lock.
15. Check the **ID Scanner Connected** box to indicate that your scanner is connected.
16. Select **Save** to save the station settings or select **Cancel** to return to the main view of the *Manager Dashboard*.

Setup Additional Printers

The **Setup Additional Printers** button allows you to setup other printers. This is necessary if you want to send order tickets to a service bar or a kitchen.

NOTE: These printers must be defined from each individual station.

To set up additional printers, select **Setup Additional Printers** from the **Station Activities** area of the *Manager Dashboard*.

The system displays the **Additional Printer Settings** on the right side of the *Manager Dashboard*.

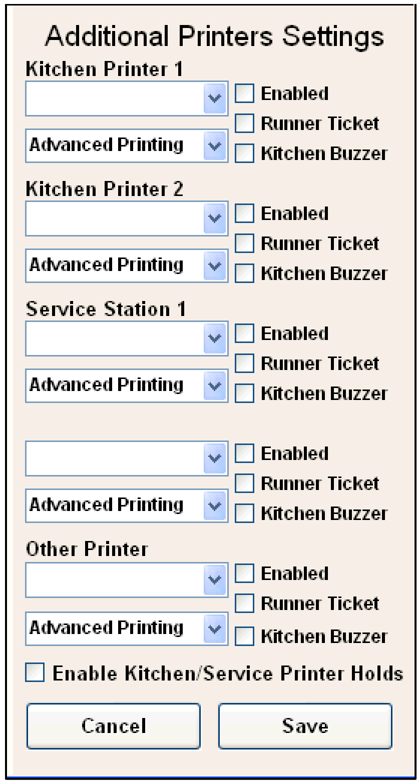


Figure 15: Additional Printer Settings on Manager Dashboard Screen

You can define the settings for five additional printers:

- Kitchen Printer 1
- Kitchen Printer 2
- Service Station 1
- Service Station 2
- Other

To set up each printer, complete the following steps:

1. Select the printer from the drop down list.

NOTE: If your printer is not on the list, you will need to add the printer in Windows. Refer to Windows Help for more information on adding a printer. Refer to the " Up a Generic Driver for Receipt Printing" section in this Manager Manual for more information.

2. Select the compatible model from the second drop down list, or leave the setting as **No Large Font**.
3. Check the **Enabled** box to enable this printer.
4. Select **Save** to save the additional printer settings or select **Cancel** to return to the main view of the *Manager Dashboard*.

Delete Pay Out

Pay Outs are a way of tracking the cash payments for the cash drawer attached to that station.

The **Delete Pay Out** button allows you to delete a payout made on that station. The station must have an open cash drawer.

NOTE: Deleting or modifying payouts may adversely affect the accuracy of previous reports.

To delete a pay out, complete the following steps:

1. Select **Delete Pay Out** from the **Station Activities** area of the *Manager Dashboard*.

The system opens the *Delete Payout* screen.

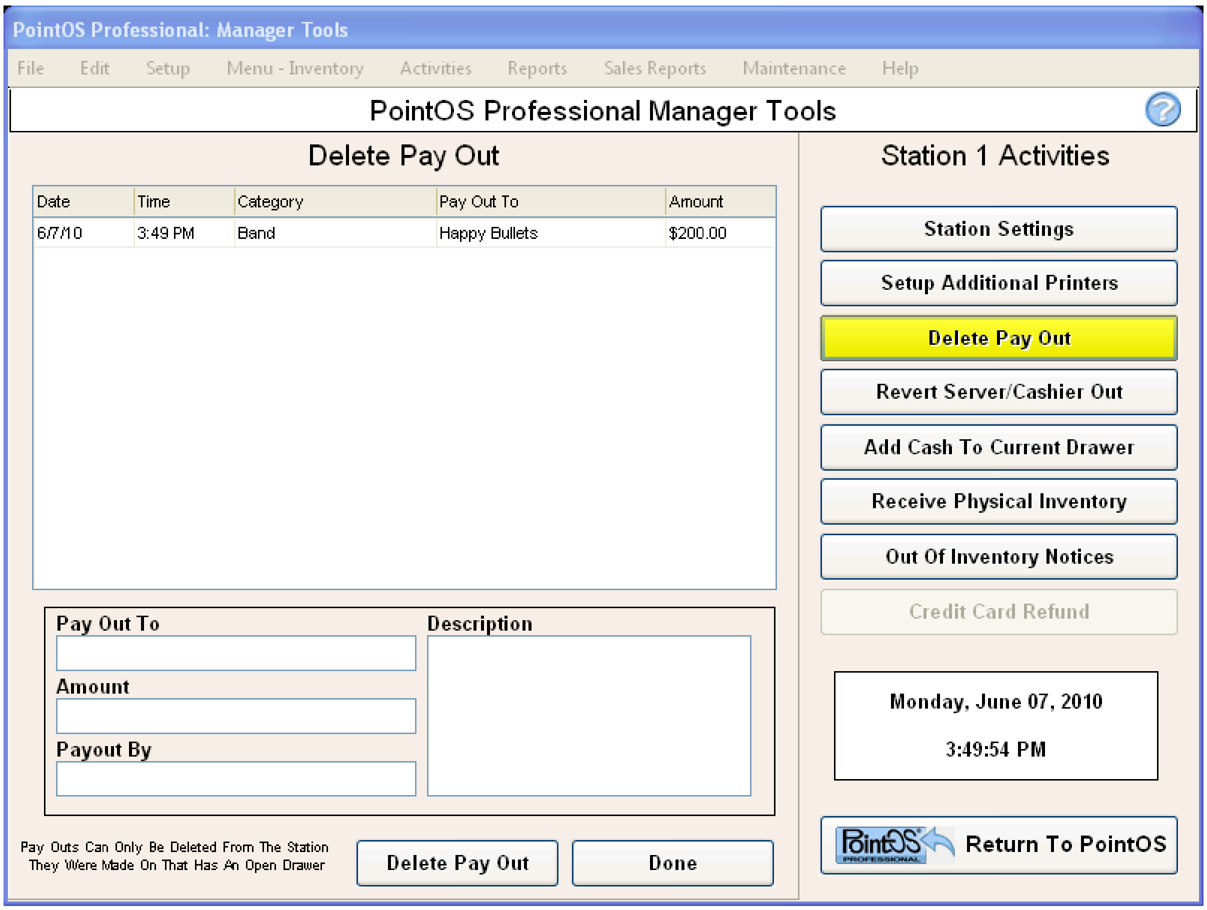


Figure 16: Delete Pay Out Screen

The **Delete Pay Out** area lists the date, time, category, pay out name, and amount of any existing pay outs for the selected station.

2. Highlight the payout you want to delete from the list.

The system displays the Pay Out To, Amount, Payout By, and Description of the selected pay out.

3. Select **Delete Pay Out** to delete the pay out.
4. Select **Done** to close the *Delete Pay Out* screen and return to the *Manager Dashboard*.

Revert Cashier Out

The **Revert Cashier Out** button allows you to cancel a cash out on that station for that day.

To cancel a cash out action for the selected station, complete the following steps:

1. Select **Revert Cashier Out** from the **Station Activities** area of the *Manager Dashboard*.

NOTE: This will only let you revert a cashier out, from that station, if it was made within the last 24 hours.

The system displays the *Revert Cashier Out* screen.

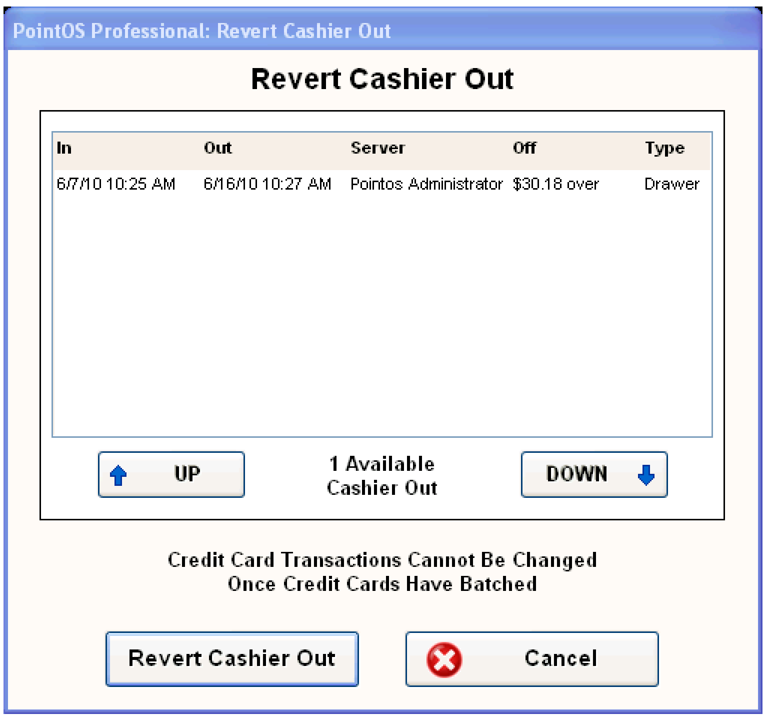


Figure 17: Revert Cashier Out Screen

2. Select the cashier or server for whom you want to revert the cash out. Use the **Up** and **Down** arrows to scroll through a long list of cash out listings.
3. Select **Revert Cashier Out**. Or select **Cancel** to close the *Revert Cashier Out* screen without reverting a cash out.
4. The system displays a warning to make sure you want to revert the cash out for the selected cashier/server. Select **Yes** to continue. Or select **No** to return to the *Revert Cashier Out* screen.

5. The system displays a message notifying you that the cashier out has been successfully reverted. Select **OK**.

The system returns to the *Manager Dashboard*.

Add Cash to Drawer

The **Add Cash to Drawer** button allows you to add cash to an open cash drawer.

To add cash to a drawer open on the selected station, complete the following steps:

1. Select **Add Cash to Current Drawer** from the **Station Activities** area of the *Manager Dashboard*.

The system displays the *Add Cash to Drawer* screen.

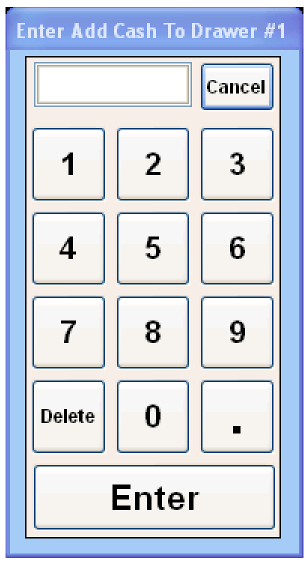


Figure 18: Add Cash to Drawer Screen

2. Enter the amount of cash to add to the drawer and select **Enter**.
3. The system displays a message confirming the amount and drawer. Select **Yes** to continue. Or select **No** to close the message and return to the *Manager Dashboard*.
4. The system displays a message confirming that you added the selected amount to the selected cash drawer. Select **OK** to close the message.

Receive Physical Inventory

The **Receive Physical Inventory** button in the **Station Activities** area of the *Manager Dashboard* allows touch screen access to control your inventory. This is designed to be used from a touch screen and can be used when inventory comes in without having to enter items in the office, or when an item has been broken and needs to be removed from inventory.

To open the *Receive Physical Inventory* screen, select **Receive Physical Inventory** from the **Station Activities** area of the *Manager Dashboard*.

The system displays the *Receive Physical Inventory* screen.

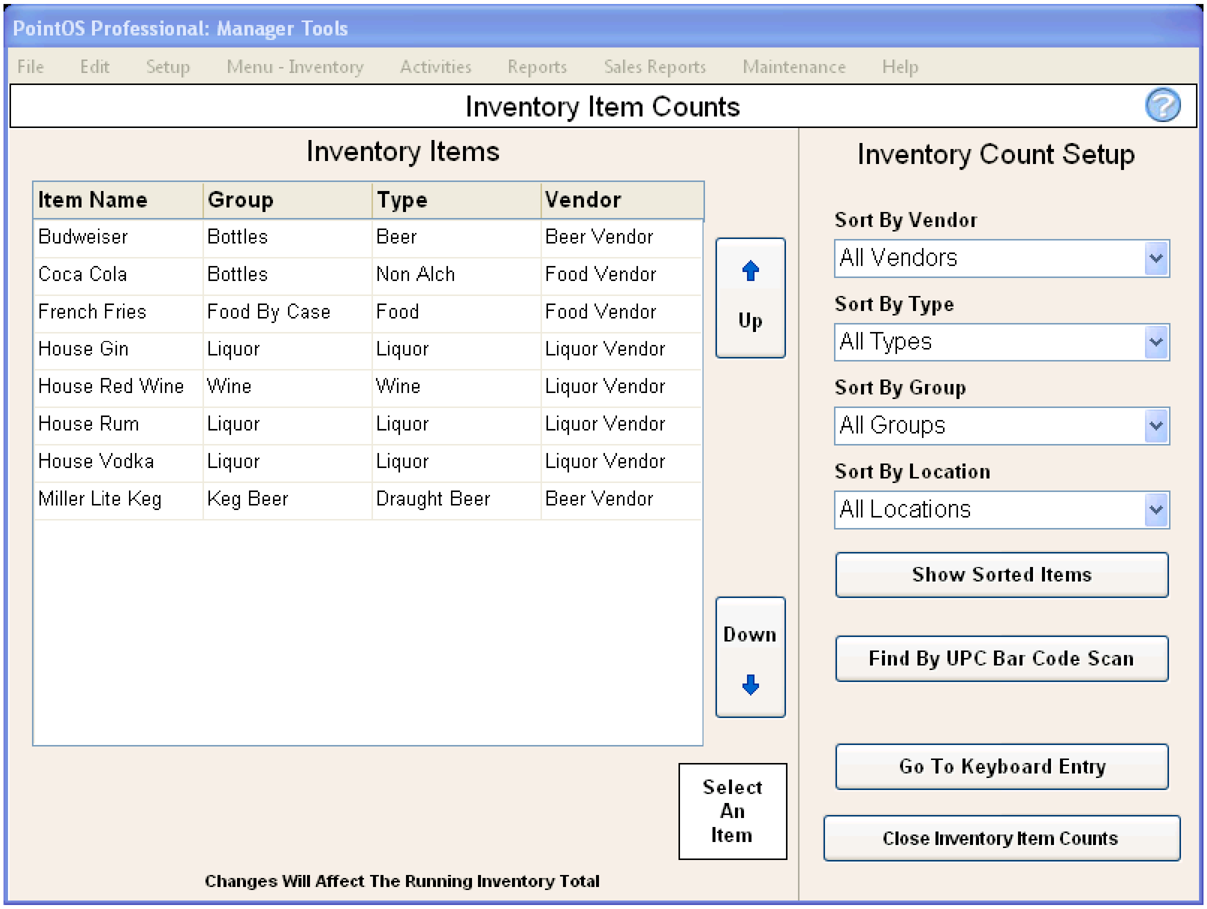


Figure 19: Inventory Item Counts (Touch screen)

This screen lists the inventory items set up in your system. You can use the **Up** and **Down** buttons to scroll through a long list of inventory items.

To search for a specific item, use one or more of the following filters.

- Select a **Vendor** from the drop down list to narrow the list to items from one vendor.
- Select a **Type** from the drop down list to narrow the list to one type of item (i.e., bottles, food by case, etc.)
- Select a **Group** from the drop down list to narrow the list to one group of item.
- Select a **Location** from the drop down list to narrow the list by where items are located.
- Select **Find By UPC Bar Code Scan** and scan the item.

Select **Show Sorted Items** to apply the inventory item filters to the list.

To adjust the inventory for an item, complete the following steps:

1. Select the item in the **Inventory Items** list.
2. Select **Subtract One Case**, **Subtract One Bottle/Portion**, **Add One Case**, or **Add One Bottle/Portion**. You can select more than one button to add or subtract multiple amounts. The square to the right of the buttons indicates how much you have added or subtracted of the selected item.

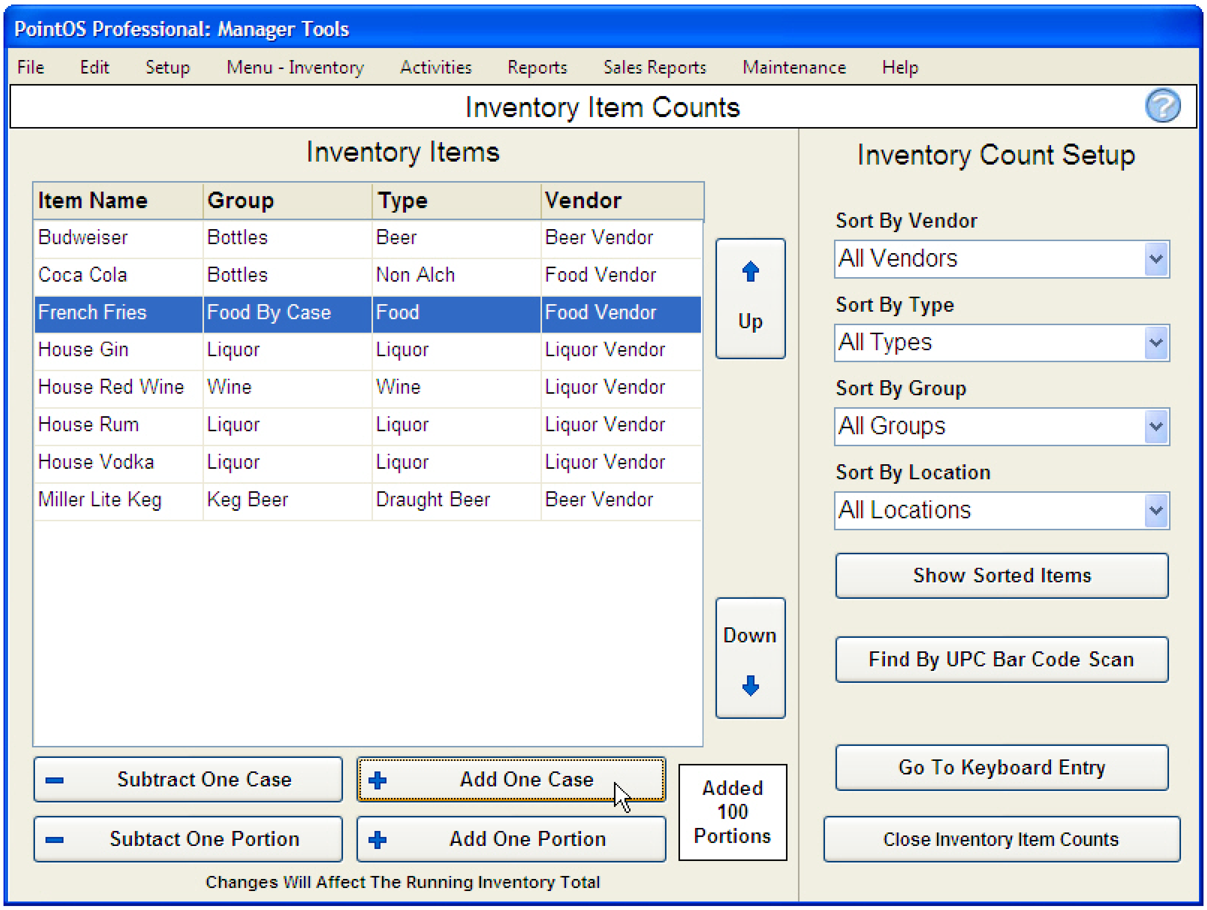


Figure 20: Inventory Item Example

Select **Go To Keyboard Entry** to open the *Inventory Item Count* screen. Refer to the "Inventory Count" section in this Manager Manual for more information.

When you have finished, select **Close Inventory item Counts** to return to the *Manager Dashboard*.

Out of Inventory Notices

The **Out of Inventory Notices** button in the **Station Activities** area of the *Manager Dashboard* allows you to provide a notice to other users that an item is out of inventory. It can indicate that the item cannot be ordered and prevent ordering of that item.

You will first need to enable the notices. Then you can add an out of inventory item notice or clear an out of inventory item notice.

To open the *Out of Inventory Notices* screen, select **Out of Inventory Notices** from the **Station Activities** area of the *Manager Dashboard*.

The system displays the *Out of Inventory Notices* screen.

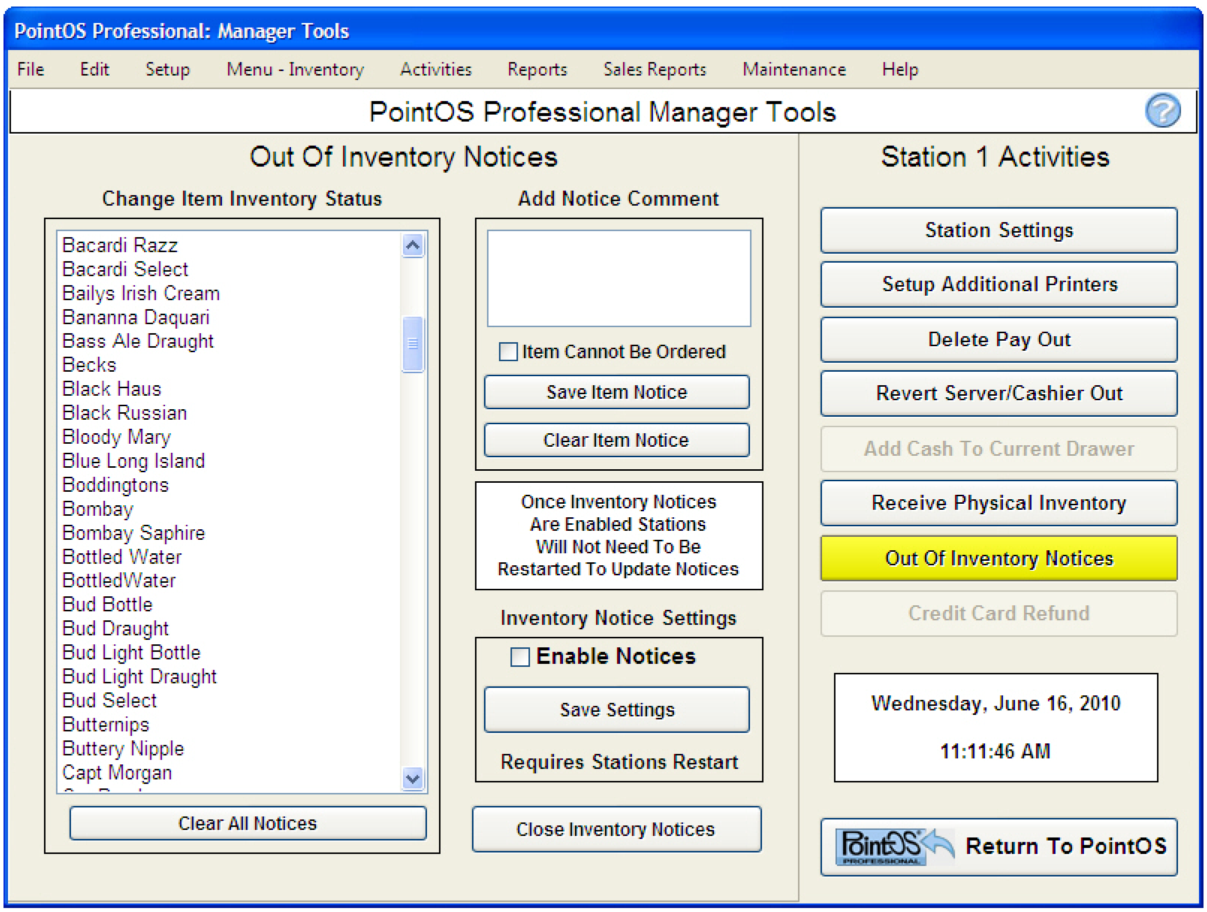


Figure 21: Out of Inventory Notices

Enable Out Of Inventory Notices on This Station

To enable notices on the current station, complete the following steps:

1. Check the **Enable Notices** box.
2. Select **Save Settings**.
3. The system displays a message asking if you want to enable inventory notices. Select **Yes** to continue or select **No** to return to the *Out of Inventory Notices* screen.
4. The system displays a message indicating that the Inventory Notice Settings have been updated. Select **OK** to close the message.
5. You must restart PointOS to activate the new setting.

Create an Out of Inventory Item Notice

To create an out of inventory notice, complete the following steps:

1. Select the inventory item from the **Change Item Inventory Status** list on the left. The items are listed in alphabetical order.
2. Enter the notice that you want to appear when the item is ordered in the **Add Notice Comment** field.
3. If you want to prevent the item from being ordered, check the **Item Cannot be Ordered** box.
4. Select **Save Item Notice**.
5. Select **Close Inventory Notices** to close the screen.

Clear an Out of Inventory Item Notice

You can clear all notices by selecting **Clear All Notices** at the bottom of the **Change Item Inventory Status** list.

To clear a single inventory item notice, complete the following steps:

1. Select the inventory item from the **Change Item Inventory Status** list on the left. The items are listed in alphabetical order.
2. Select **Clear Item Notice**.
3. Select **Close Inventory Notices** to close the screen.

Credit Card Refund

If you have credit cards enabled on your system, the **Credit Card Refund** button allows you to issue a credit card refund. The refund will not be available until you batch your credit cards.

To issue a credit card refund, select **Credit Card Refund** from the **Station Activities** area of the *Manager Dashboard*.

The system displays the *Credit Card Refund* screen. Refer to the "Credit Card Refund" section in this Manager Manual for more information.

Return to PointOS

Select the **Return to PointOS** button to close the *Manager Dashboard* and return to the *Main Menu*.

File Menu

Overview

The **File** Menu includes options related to the database, printers, and navigation back to the *Main* screen.

Select Database

The **Select Database** option allows you to restart PointOS and select a new database. You might use this if you have set up a training database for new employees.

To select a new database, complete the following steps:

1. Choose **Select Database** from the **File** menu.
2. The system displays an alert asking if you want to select a new database. Select **Yes** to continue. Or select **No** to close the message without selecting a new database.
3. The system displays another alert, notifying you that PointOS will restart. Select **OK**.

The system displays the *Select a Database* screen.

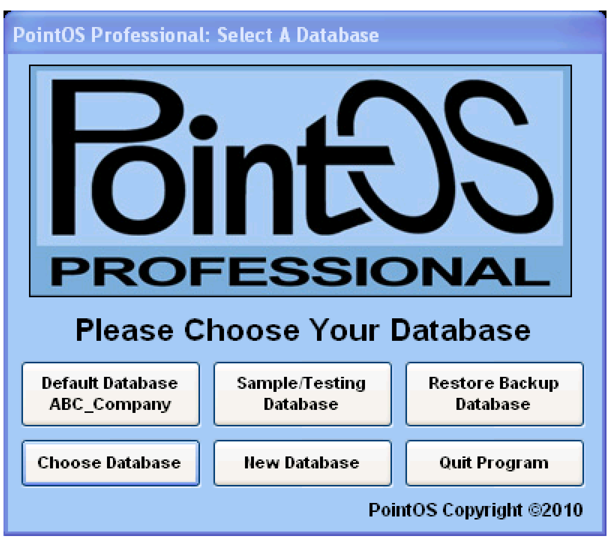


Figure 22: Select a Database Screen

4. Select one of the following options:
   - **Default Database -** the database you have previously created
   - **Sample/Testing Database -** a sample database in the Demo version of the software to try out the software
   - **New Database -** to create a new database (Refer to the " Database" section in this Manager Manual for more information.)
   - **Choose Database -** to select an existing database from the server (Refer to the " Database" section in this Manager Manual for more information.)

Select **Quit Program** to close PointOS.

Restore Database

NOTE: Restoring the database is intended for emergency recovery of data only.

The **Restore Database** option allows you to restore your database to a previously backed up version in case of data loss.

NOTE: You can restore only on a computer that is running the server portion (SQL) and not from a station running client only.

To restore a previously backed up database, complete the following steps:

1. Select **Restore Database** from the **File** menu.

The system displays the Windows *Open* dialog box to select the appropriate backup file.

2. Highlight the backup file you want to use. Backup databases have the file extension **.bak**.
3. Select **Open.** Or select **Cancel** to close the dialog box without restoring the database.

The system displays the *Name Your Restored Database* screen.

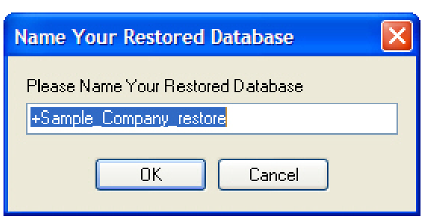


Figure 23: Name Your Restored Database Screen

4. Enter the name for your restored database.
5. Select **OK** or select **Cancel** to close the dialog without restoring the database.

The system displays a message while it restores the database.

6. The system displays an alert to restart PointOS. Select **Yes** to continue.

Import Customers

The *Import Customers* screen allows you to use an Excel file to enter your customer data in a spreadsheet format rather than using the *Add New Customer* screen.

The process for using this feature is:

1. Use the *Import Customer Data* screen to export the Excel template to use for entering data. This ensures that you have the correct fields and headings for your customer data.
2. Open Excel and enter your customer data. Save the customer Excel file in the PointOS Database folder on the computer acting as server for your PointOS setup.
3. Use the *Import Customer Data* screen to import the customer data into PointOS.
4. Save the customers to the database.

Open the Import Customer Data Screen

To open the *Import Customer Data* screen, select **Import Customers** from the **File** Menu.

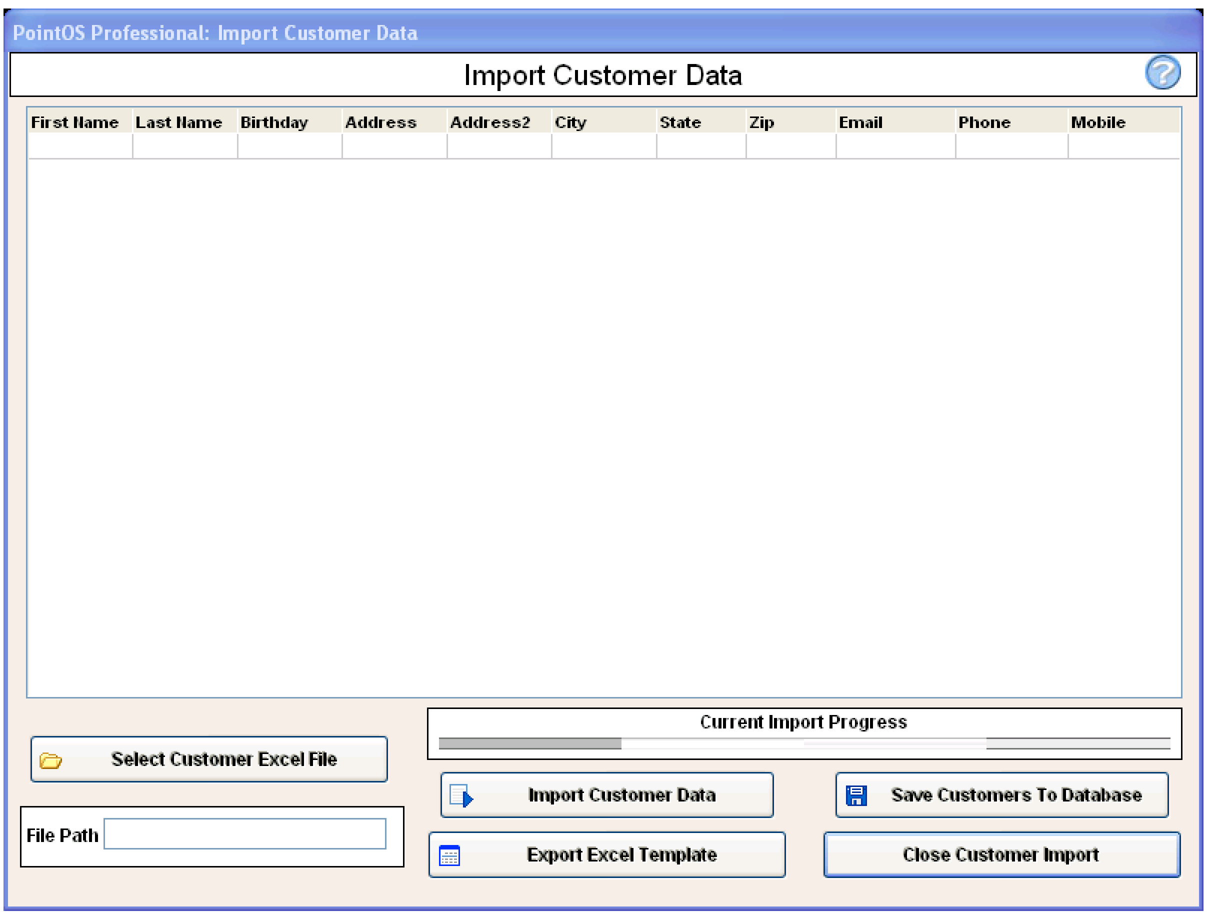


Figure 24: Import Customer Data Screen

Export Excel Template

To export the template for entering your customer data in Excel, complete the following steps:

1. Select the **Export Excel Template** button from the *Import Customer Data* screen.
2. Windows displays the *Browse for a folder* dialog box to determine where you want to save the Excel template. Select a location and select the **OK** button.
3. The system displays a message indicating that the file has been saved. Select **OK** to close the message.

Now you will look for the **PointOS Import Customer Worksheet** file in the location you saved. Open it in Excel and enter your customer data. When you have finished, save the file.

Import Customer Data

To import the customer data, complete the following steps:

1. Select the **Select Customer Excel File** button on the *Import Customer Data* screen.
2. Windows displays the *Open* dialog box to help you select the correct file. Locate the file on your computer and select **Open**.

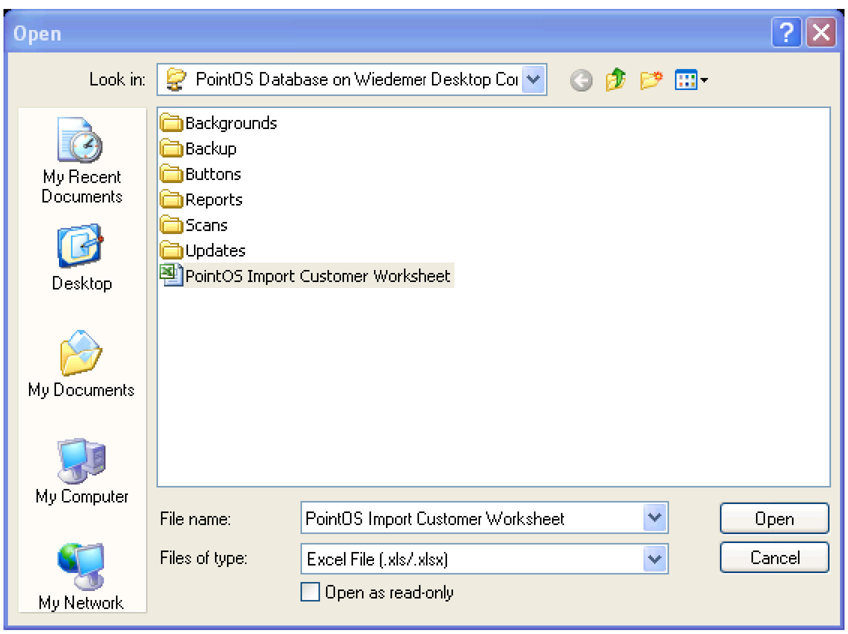


Figure 25: Windows Open for Import Customer Data

3. The system displays a message asking if you would like to import the data now. Select **Yes** to continue. Or select **No** to close the dialog box without importing the data.
4. The system displays a message indicating that the import was successful. Select **OK** to close the message.

5. Review the contents of the file in the list of customers. You can edit the fields, but you cannot add or delete customers from here.
6. Select **Save Customers to Database**.

NOTE: If you close the screen without saving the data, the customers will not be included in your database.

7. The system displays a message indicating that the save was successful with the number of customers added to the database. Select **OK** to close the message.

Import Employees

The *Import Employees* screen allows you to use an Excel file to enter your employee data in a spreadsheet format rather than using the *Employee Setup* screen.

The process for using this feature is:

1. Use the *Import Employees* screen to export the Excel template to use for entering data. This ensures that you have the correct fields and headings for your employee data.
2. Open Excel and enter your employee data. Save the employee Excel file in the PointOS Database folder on the computer acting as server for your PointOS setup.
3. Use the *Import Employees* screen to import the employee data into PointOS.
4. Save the employees to the database.

Open the Import Employee Data Screen

To open the *Import Employee Data* screen, select **Import Employees** from the **File** Menu.

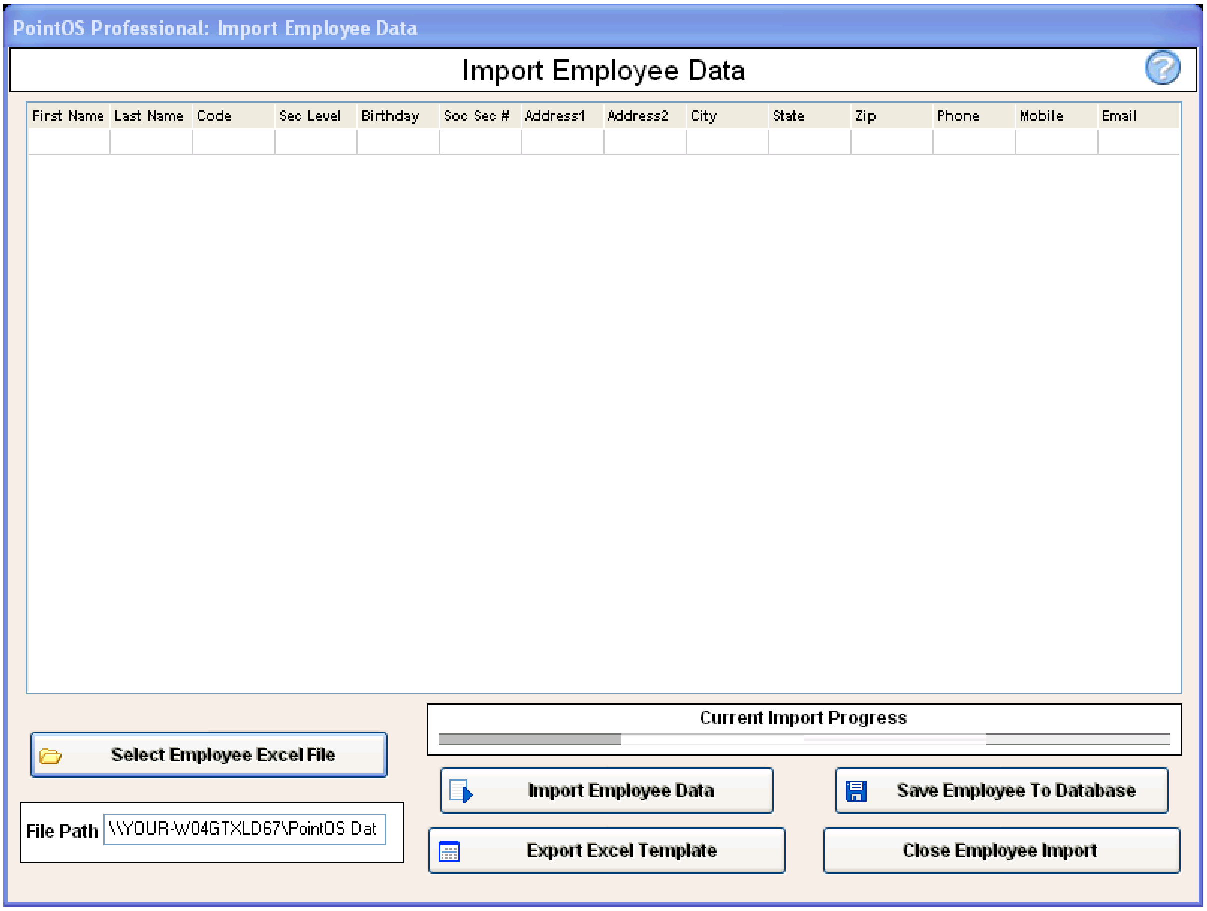


Figure 26: Import Employee Data Screen

Export Excel Template

To export the template for entering your employee data in Excel, complete the following steps:

1. Select the **Export Excel Template** button from the *Import Employee Data* screen.
2. Windows displays the *Browse for a folder* dialog box to determine where you want to save the Excel template. Select a location and select the **OK** button.
3. The system displays a message indicating that the file has been saved. Select **OK** to close the message.

Now you will look for the **PointOS Employee Import Worksheet** file in the location you saved. Open it in Excel and enter your employee data. When you have finished, save the file.

Import Employee Data

To import the employee data, complete the following steps:

1. Select the **Select Employee Excel File** button on the *Import Employee Data* screen.
2. Windows displays the *Open* dialog box to help you select the correct file. Locate the file on your computer and select **Open**.
3. The system displays a message asking if you would like to import the data now. Select **Yes** to continue. Or select **No** to close the dialog box without importing the data.
4. The system displays a message indicating that the import was successful. Select **OK** to close the message.
5. Review the contents of the file in the list of employees. You can edit the fields, but you cannot add or delete employees from here.
6. Select **Save Employee to Database**.

NOTE: If you close the screen without saving the data, the employees will not be included in your database.

7. The system displays a message indicating that the save was successful with the number of employees added to the database. Select **OK** to close the message.

Import Menu Items

The *Import Menu Item Data* screen allows you to use an Excel file to enter your menu items in a spreadsheet format rather than using the *Menu Setup* screen.

The process for using this feature is:

1. Use the *Import Menu Item Data* screen to export the Excel template to use for entering data. This ensures that you have the correct fields and headings for your menu item data.
2. Open Excel and enter your menu item data. Save the menu item Excel file in the PointOS Database folder on the computer acting as server for your PointOS setup.
3. Use the *Import Menu Item Data* screen to import the menu item data into PointOS.
4. Save the menu items to the database.

Open the Import Menu Item Data Screen

To open the *Import Menu Item Data* screen, select **Import Menu Items** from the **File** Menu.

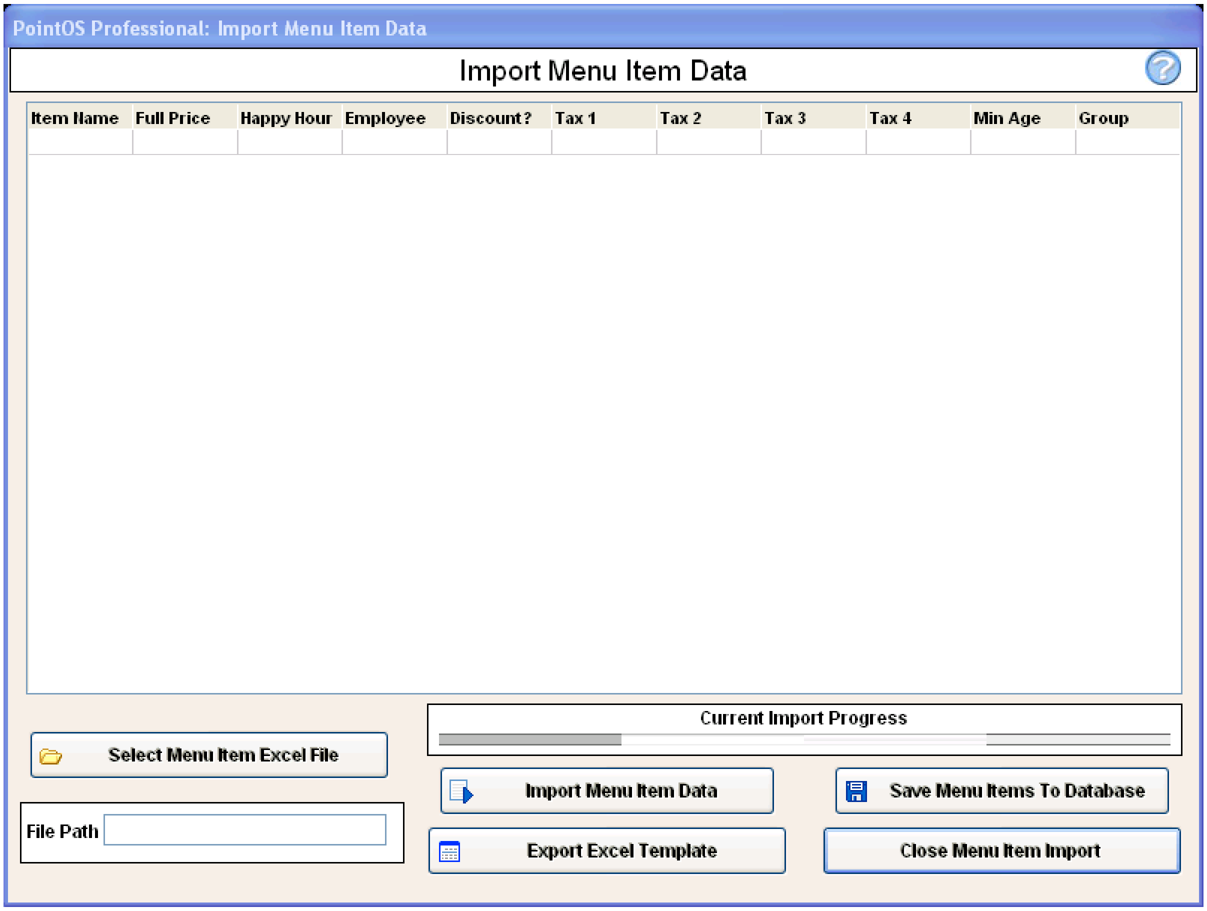


Figure 27: Import Menu Item Data Screen

Export Excel Template

To export the template for entering your menu item data in Excel, complete the following steps:

1. Select the **Export Excel Template** button from the *Import Menu Item Data* screen.
2. Windows displays the *Browse for a folder* dialog box to determine where you want to save the Excel template. Select a location and select the **OK** button.
3. The system displays a message indicating that the file has been saved. Select **OK** to close the message.

Now you will look for the **PointOS Menu Item Import Worksheet** file in the location you saved. Open it in Excel and enter your menu item data. When you have finished, save the file.

Import Menu Item Data

To import the menu item data, complete the following steps:

1. Select the **Select Menu Item Excel File** button on the *Import Menu Item Data* screen.
2. Windows displays the *Open* dialog box to help you select the correct file. Locate the file on your computer and select **Open**.
3. The system displays a message asking if you would like to import the data now. Select **Yes** to continue. Or select **No** to close the dialog box without importing the data.
4. The system displays a message indicating that the import was successful. Select **OK** to close the message.
5. Review the contents of the file in the list of menu items. You can edit the fields, but you cannot add or delete menu items from here.
6. Select **Save Menu Items to Database**.

NOTE: If you close the screen without saving the data, the menu items will not be included in your database.

7. The system displays a message indicating that the save was successful with the number of menu items added to the database. Select **OK** to close the message.
8. The system displays a message informing you that your imported menu items are currently hidden. Select **OK** to close the message.
9. Open the *Menu Item Setup* screen to attach the imported menu items to an open slot on the menu. Refer to the " Item Setup" section in this Manager Manual for more information.

NOTE: Remember that the imported items are hidden until you assign them to a category and an open slot on the menu.

Import Inventory Items

The *Import Inventory Item Data* screen allows you to use an Excel file to enter your inventory items in a spreadsheet format rather than using the *Inventory Item Setup* screen.

The process for using this feature is:

1. Use the *Import Inventory Item Data* screen to export the Excel template to use for entering data. This ensures that you have the correct fields and headings for your inventory item data.
2. Open Excel and enter your inventory item data. Save the inventory item Excel file in the PointOS Database folder on the computer acting as server for your PointOS setup.
3. Use the *Import Inventory Item Data* screen to import the inventory item data into PointOS.
4. Save the inventory items to the database.

Open the Import Inventory Item Data Screen

To open the *Import Menu Item Data* screen, select **Import Inventory Items** from the **File** Menu.

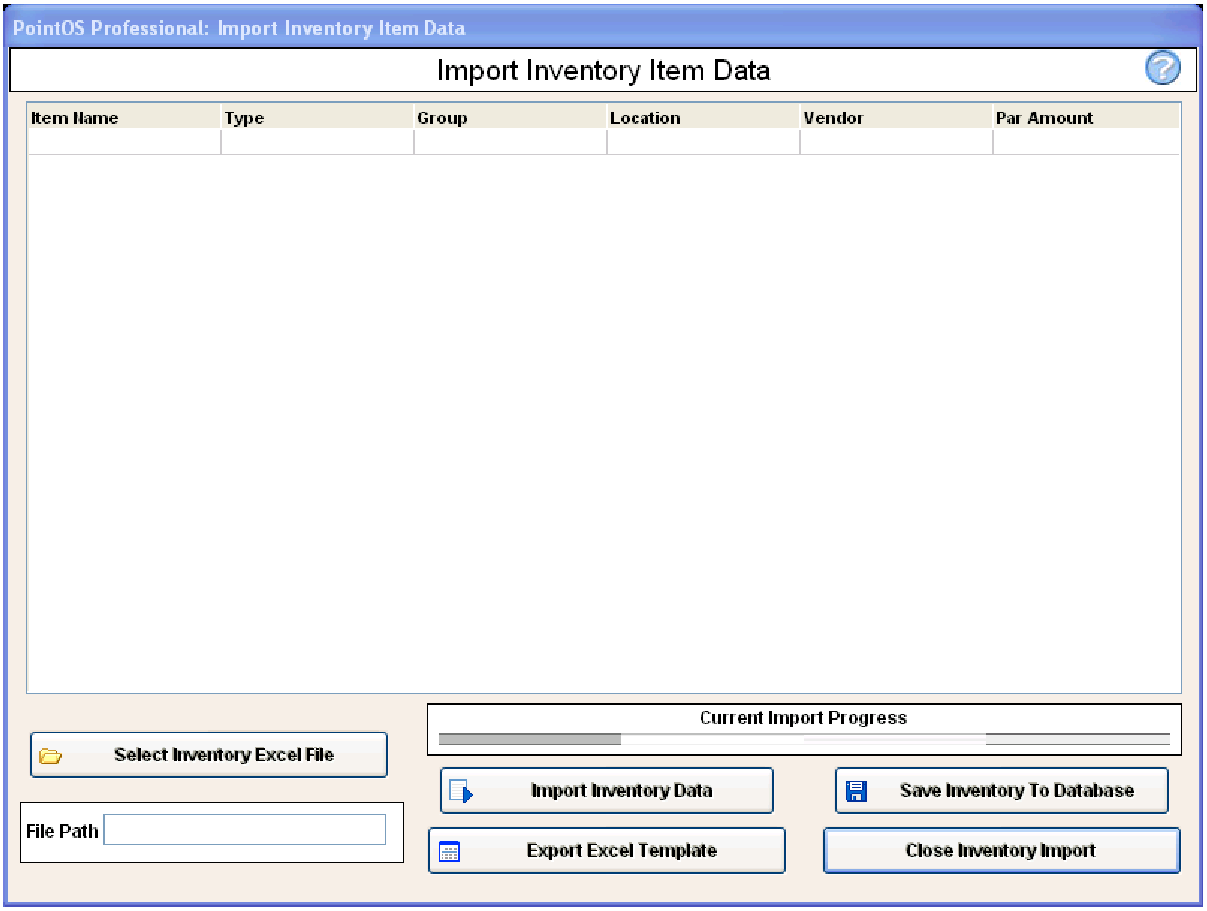


Figure 28: Import Inventory Item Data Screen

Export Excel Template

To export the template for entering your inventory item data in Excel, complete the following steps:

1. Select the **Export Excel Template** button from the *Import Inventory Item Data* screen.
2. Windows displays the *Browse for a folder* dialog box to determine where you want to save the Excel template. Select a location and select the **OK** button.
3. The system displays a message indicating that the file has been saved. Select **OK** to close the message.

Now you will look for the **PointOS Inventory Item Import Worksheet** file in the location you saved. Open it in Excel and enter your menu item data. When you have finished, save the file.

Import Inventory Item Data

To import the menu item data, complete the following steps:

1. Select the **Select Menu Item Excel File** button on the *Import Inventory Item Data* screen.
2. Windows displays the *Open* dialog box to help you select the correct file. Locate the file on your computer and select **Open**.
3. The system displays a message asking if you would like to import the data now. Select **Yes** to continue. Or select **No** to close the dialog box without importing the data.
4. The system displays a message indicating that the import was successful. Select **OK** to close the message.
5. Review the contents of the file in the list of inventory items. You can edit the fields, but you cannot add or delete inventory items from here.
6. Select **Save Inventory to Database**.

NOTE: If you close the screen without saving the data, the inventory items will not be included in your database.

7. The system displays a message indicating that the save was successful with the number of inventory items added to the database. Select **OK** to close the message.

Report Printer Setup

The **Report Printer Setup** option allows you to select a printer to use for printing reports.

To set up a report printer for the current station, complete the following steps:

1. Select **Report Printer Setup** from the **File** menu.

The system displays the *Set Report Printer* screen.

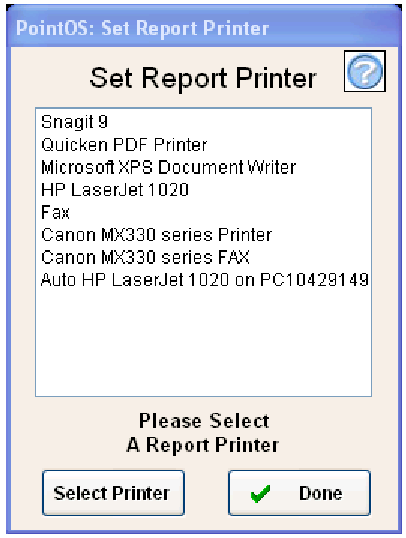


Figure 29: Set Report Printer Screen

2. Highlight one of the printers installed on the station.

NOTE: If your printer is not on the list, you will need to add the printer in Windows. Refer to Windows Help for more information on adding a printer. Refer to the " Up a Generic Driver for Receipt Printing" section in this Manager Manual for more information.

3. Choose the **Select Printer** button.
4. Select **Done** to close the Set *Report Printer* screen.

Advanced Printer Add

The **Advanced Printer Add** option allows you to add a new or change existing receipt printers.

NOTE: This option is only for advanced users.

Refer to http://www.pointos.com/printercodes.html for some pop/cut codes. If these do not work, you may need to contact the manufacturer.

To add a new receipt printer, complete the following steps:

1. Choose **Advanced Printer Add** from the **File** menu.
2. The system displays a Manager alert. Select **OK** to continue.

The system displays the *Add New Printer Type* screen.

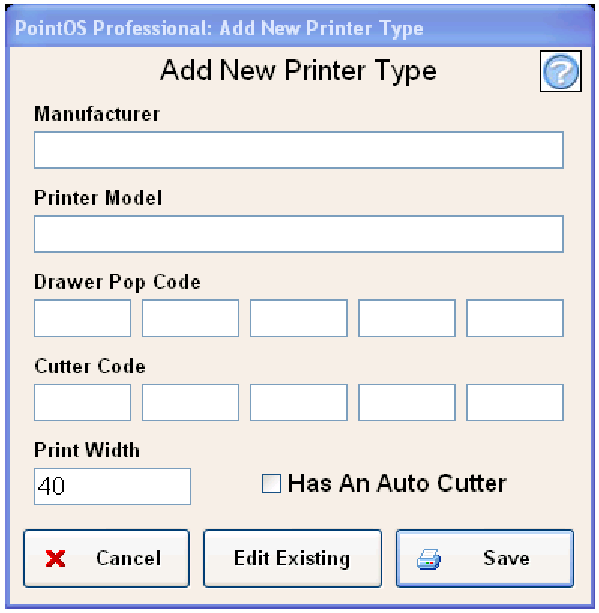


Figure 30: Add New Printer Type Screen

3. Enter the printer **Manufacturer**.
4. Enter the **Printer Model**.
5. Enter the **Drawer Pop Code**.
6. Enter the **Cutter Code**.
7. If necessary, change the **Print Width**.
8. Check the **Has An Auto Cutter** box, if applicable.
9. Select **Save**. Or select **Cancel** to close the *Add New Printer Type* screen without adding a new printer.

NOTE: Editing existing printer profiles is NOT recommended.

Pole Display Setup

The *Pole Display Setup* screen allows you to connect your pole display to your PointOS computer via a Comm port. You can control the display width of the pole display from PointOS.

To change pole display setup, complete the following steps:

1. Select **Pole Display Setup** from the **File** Menu.

The system displays the *Pole Display Setup* screen.

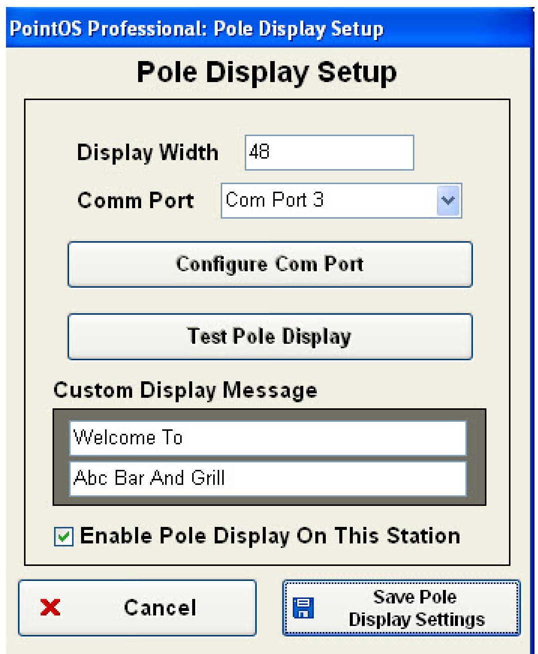


Figure 31: Pole Display Setup Screen

2. Enter the **Display Width**.
3. Select the **Comm Port** from the drop down list.
4. Select **Configure Comm Port** to open a screen to change the configuration of the comm port. You can change the Bits per second, Data bits, Parity, Stop bits, and Flow control. Select **OK** to close the COM Properties screen.
5. Check the **Enable Pole Display on this Station** box.
6. Enter your text for the **Custom Display Message**.
7. Select **Test Pole Display** to check your setup.
8. Select **Save Pole Display Settings**. Or select **Cancel** to close the screen without changing the Pole Display settings.

Restart PointOS

After completing some tasks, you will need to restart PointOS before the changes take effect in the system. The **Restart PointOS** option allows you to quickly restart PointOS.

To restart PointOS, complete the following steps:

1. Choose **Restart PointOS** from the **File** menu.
2. The system displays an alert asking if you want to restart PointOS. Select **Yes** to restart, or select **No** to return to the previous screen.

The system restarts and opens to the *Main Menu*.

Return to Point OS

The **Return to PointOS** option allows you to quickly return to the *Main Menu*.

To return to PointOS, complete the following steps:

1. Select **Return to PointOS** from the **File** menu.

The system immediately returns to the *Main Menu*.

Exit

The **Exit** option closes PointOS.

Select **Exit** from the **File** menu. PointOS closes immediately.

Edit Menu

Overview

The Edit Menu includes options related to filling out text fields. You can also use the standard Windows shortcuts for these options.

Cut

Highlight the text you want to remove and copy and select **Cut** from the **Edit** menu.

Copy

Highlight the text you want to copy and select **Copy** from the **Edit** menu.

Paste

Place your cursor where you want to paste the copied or cut text and select **Paste** from the **Edit** menu.

Delete

Highlight the text you want to delete and select **Delete** from the **Edit** menu.

Select All

Place your cursor in the field and choose **Select All** from the **Edit** menu. The system highlights all of the text in that field.

On-Screen Keyboard

Select **On-Screen Keyboard** from the **Edit** menu to display the Microsoft On-Screen Keyboard.

Figure 32: On-Screen Keyboard

Setup Menu

Overview

The **Setup** Menu provides access to all of the options you will need to set up to maximize your use of PointOS Professional.

Main Setup

The system opens the *Main Setup* screen as part of the initial startup when you install PointOS. If you need to change any of the following information, you can return to the *Main Setup* screen:

- Company Information
- Company Contact Information
- Measurements or Day Start Time
- Receipt Message
- Menu page graphic or background color
- Upgrade for additional stations

To open the *Main Setup* screen, select **Main Setup** from the **Setup** menu.

The system opens the *Main Setup* screen. Refer to the "Main Setup" section in the "Getting Started" chapter of this Manager Manual for more information on this screen.

Employee Setup

The system opens the *Employee Setup* screen as part of the initial startup when you install PointOS.

You can return to the *Employee Setup* screen later if you need to:

- Add new employees
- Terminate employees
- Inactivate employees or reactivate inactive employees
- Change employee information or security settings

To open the *Employee Setup* screen, select **Employee Setup** from the **Setup** menu.

The system opens the *Employee Setup* screen. You can access the *Change Employee Options* screen from the *Employee Setup* screen. Refer to the "Employee Setup" section in the "Getting Started" chapter of this Manager Manual for more information either screen.

Payment Setup

The *Payment Setup* screen allows you to set all of your payment options and information.

NOTE: Credit cards must be enabled in two places: on the *Payment Setup* screen, and on EACH station where credit cards are accepted (some stations may be cash only).

To open the *Payment Setup* screen, select **Payment Setup** from the **Setup** menu.

The system displays the *Payment Setup* screen.

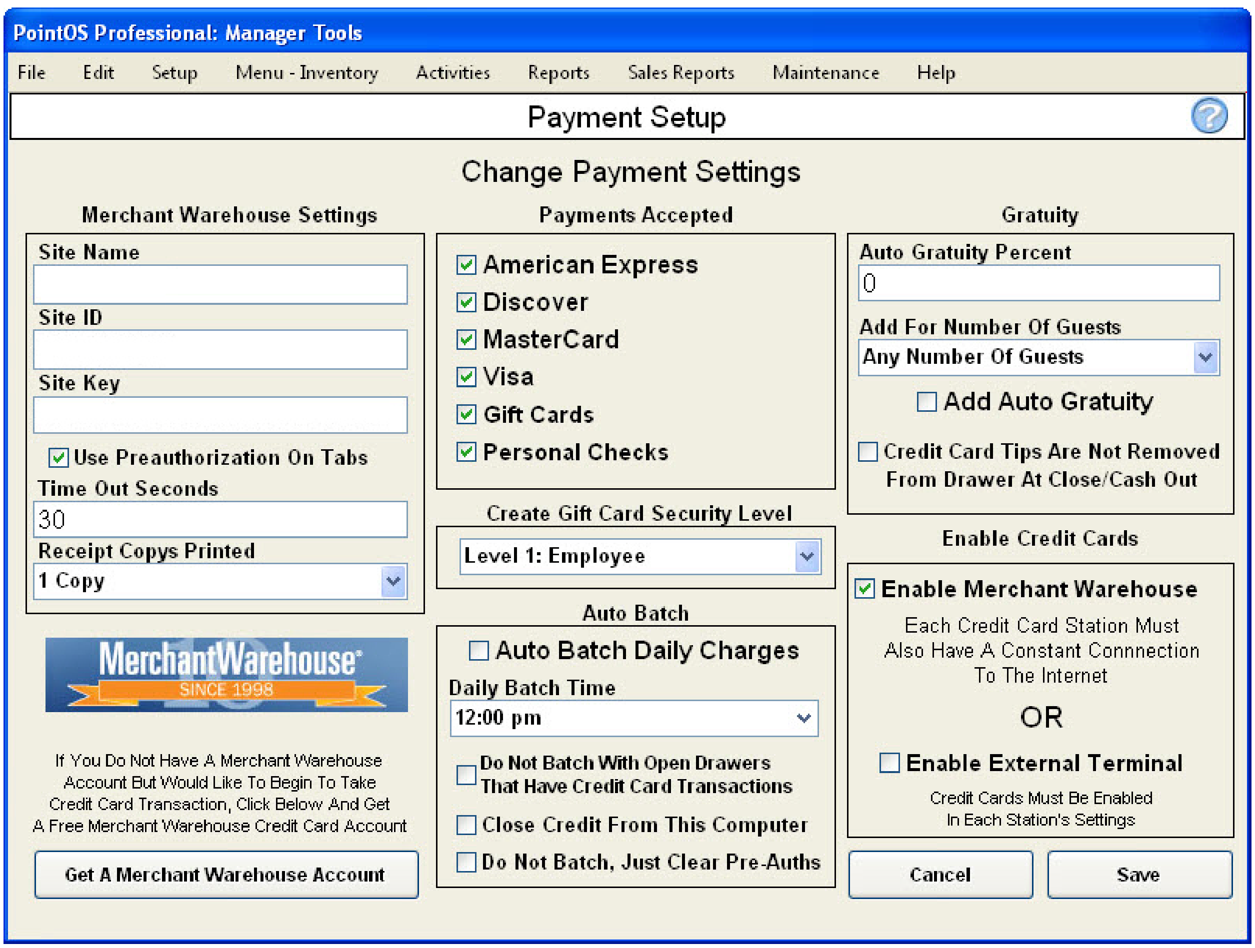


Figure 33: Payment Setup Screen

PointOS Professional integrates with Merchant Warehouse for credit card processing. Merchant Warehouse is available FREE with nothing to install.

You must have a Merchant Warehouse account to accept credit cards and gift cards through PointOS. All tech support for Merchant Warehouse is offered by them, and is included with your merchant account. Refer to the "Setting Up a Merchant Warehouse Account" section in this Manager Manual for more information.

To set up your payment options, complete the following steps:

1. To integrate PointOS with Merchant Warehouse, enter the following information related to your Merchant Warehouse account:
   - Site Name
   - Site ID
   - Site Key

NOTE: This information must be EXACTLY the same as the information from the email from Merchant Warehouse. It is case sensitive. You may want to copy and paste from the email. If you have been incorrectly given a **Site Name** with a ' or & in it, please contact Merchant Warehouse to get a new Site Name. Site Names with apostrophes or ampersands will not work.

2. Check the **Use Preauthorizations on Tabs** box if you want to use preauthorizations. Clear the box if you do not want to use preauthorizations.

NOTE: If you use preauthorizations, you must clear the preauthorizations by batching in PointOS. If you do not clear the preauthorizations and you batch with Merchant Warehouse, your customers will incur a $.01 charge.

We do not recommend charges over $250 for preauthorizations. Charges over $250 on preauthorizations may hold up your batching.

3. If you are using a modem instead of a high speed connection, you may want to increase the amount of time in the **Time Out Seconds** field (for example, to 30 seconds). The default is 15 seconds.
4. Select the number of receipt copies to print from the **Receipt Copies Printed** drop down list. Some printers print two copies of all printouts using two ply paper. If you do not have this feature on your printer, set this to two copies.
5. You can select which forms of payments that you will receive. In addition to the various credit card types, you can choose to take gift cards or personal checks. Check the payment options accepted boxes to indicate which types of payments are accepted.

NOTE: A Merchant Warehouse account is required to accept credit cards or gift cards as payment.

6. To set the security for activating and issuing gift cards to customers, select the security level from the **Create Gift Card Security Level** drop down list. The default level is the same as the security level for taking orders. Gift cards must be added to the menu before they can be sold. Refer to the " Setup" section in this Manager Manual for more information.

7. You can set up the system to auto batch all credit card sales each day. While you can also use the Merchant Warehouse interface to auto batch, using PointOS provides more control over batching and allows you to see the daily batch result on the *Manager Dashboard*. To setup auto batch:
   - Check the **Auto Batch Daily Charges** box.
   - Select the time to perform the daily batch. Refer to the " the Time" section in this Manager Manual for more information on using the clock to set the time.
   - Check the **Do Not Batch with Open Drawers That Have Credit Card Transactions** box to postpone batching if any open drawers have credit card transactions. This means that if a server forgets to do closeout, he or she will not lose the gratuity.
   - Check the **Close Credit From This Computer** box to indicate that this computer only should be used to perform the daily batch.
   - Check the **Do Not Batch, Just Clear Pre-Auths** box to clear credit card pre-authorizations without batching.

NOTE: In the rare instance that you are running different databases with the same Merchant Account, you may not want both accounts to batch, but need to clear the pre-authorization on the account that does not batch. If you are using pre authorizations on credit cards, you **must** batch from PointOS. Pre authorizations do a $.01 sale, and if they are not closed, they will be cleared when batching.

You can also batch credit cards manually. Refer to the "Batch Credit Cards" section in this Manager Manual for more information.

8. You can set the system to automatically add a percent gratuity to all checks for a selected number of guests. This gratuity amount will be added to cash, personal check, gift card, and credit card sales.
   - Check the **Add Auto Gratuity** check box.
   - Enter the percent to add automatically in the **Auto Gratuity Percent** box.
   - Select the number of guests for which to automatically add gratuity from the **Add For Number of Guests** drop down list.
9. Check the **Credit Card Tips are not removed from Drawer at Close/Cash Out** box if applicable.
10. To activate Merchant Warehouse on your system, check the **Enable Merchant Warehouse** box.
11. Instead of using Merchant Warehouse, you can check the **Enable External Terminal** box. PointOS will track and report on credit card charges, but there is no integrated processing.
12. Select **Save** button to complete the *Payment Setup*. Or select **Cancel** to close the *Payment Setup screen* without saving.

Taxes Setup

The *Taxes Setup* screen allows you to set several different types of taxes that are on items you sell. Some areas tax different items at different rates. You can set these items to include the price or have them as an add on. Included taxes do not show up on a customer's tab.

To open the *Taxes Setup* screen, select **Taxes Setup** from the **Setup** menu.

The system displays the *Taxes Setup* screen.

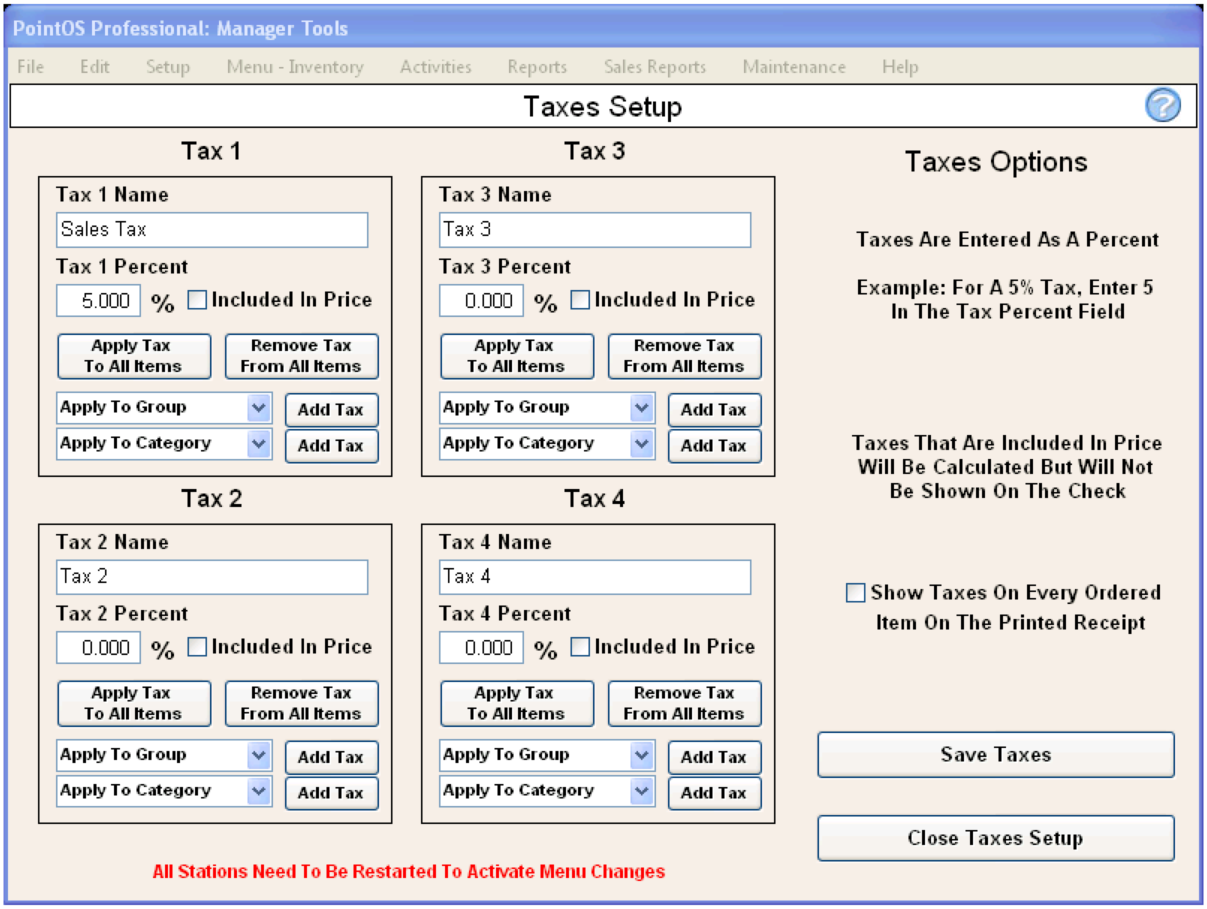


Figure 34: Taxes Setup Screen

You can define up to four different tax rates for different items. For each tax rate, complete the following steps:

1. Enter the name of the tax rate in the **Tax Name** field. You can choose to leave the default names, if desired (i.e., Tax 1, Tax 2, Tax 3, or Tax 4).
2. Enter the number for the percent in the percent field. For example, enter 5 for a 5% tax rate.
3. If you want to include the tax in the price of the selected items, select the **Included in Price** box. If you check this, the tax will be calculated, but it will not be shown as a separate item on the check.
4. Select the **Apply Tax to All Items** to apply the selected tax to ALL items on the menu. The system displays a message to make sure you want to do this. Select **Yes** to continue and **OK** on the confirmation message. You can also select **Remove Tax From All Items** on the menu. The system displays a message to make sure you want to do this. Select **Yes** to continue and **OK** on the confirmation message.

5. To add the selected tax to all items in a certain group, select the group from the drop down list. Select the **Add Tax** button next to the group. Select **OK** on the confirmation message.
6. To add the selected tax to all items in a certain category, select the category from the drop down list. Select the **Add Tax** button next to the category. Select **OK** on the confirmation message.
7. Check the **Show Taxes On Every Ordered Item On Printer Receipt** box to include the taxes on the printed receipt.
8. Select **Save Taxes** to complete the *Taxes Setup* and close the screen. The system displays an alert notifying you that all stations must be restarted before the new tax information can be used. Select **OK**. To close the screen without saving changes, select **Close Taxes Setup**.

Database Setup

The *Database Setup* screen contains tools that allow you to keep your database running quickly and efficiently.

To open the *Database Setup* screen, select **Database Setup** from the **Setup** menu.

The system displays the *Database Setup* screen.

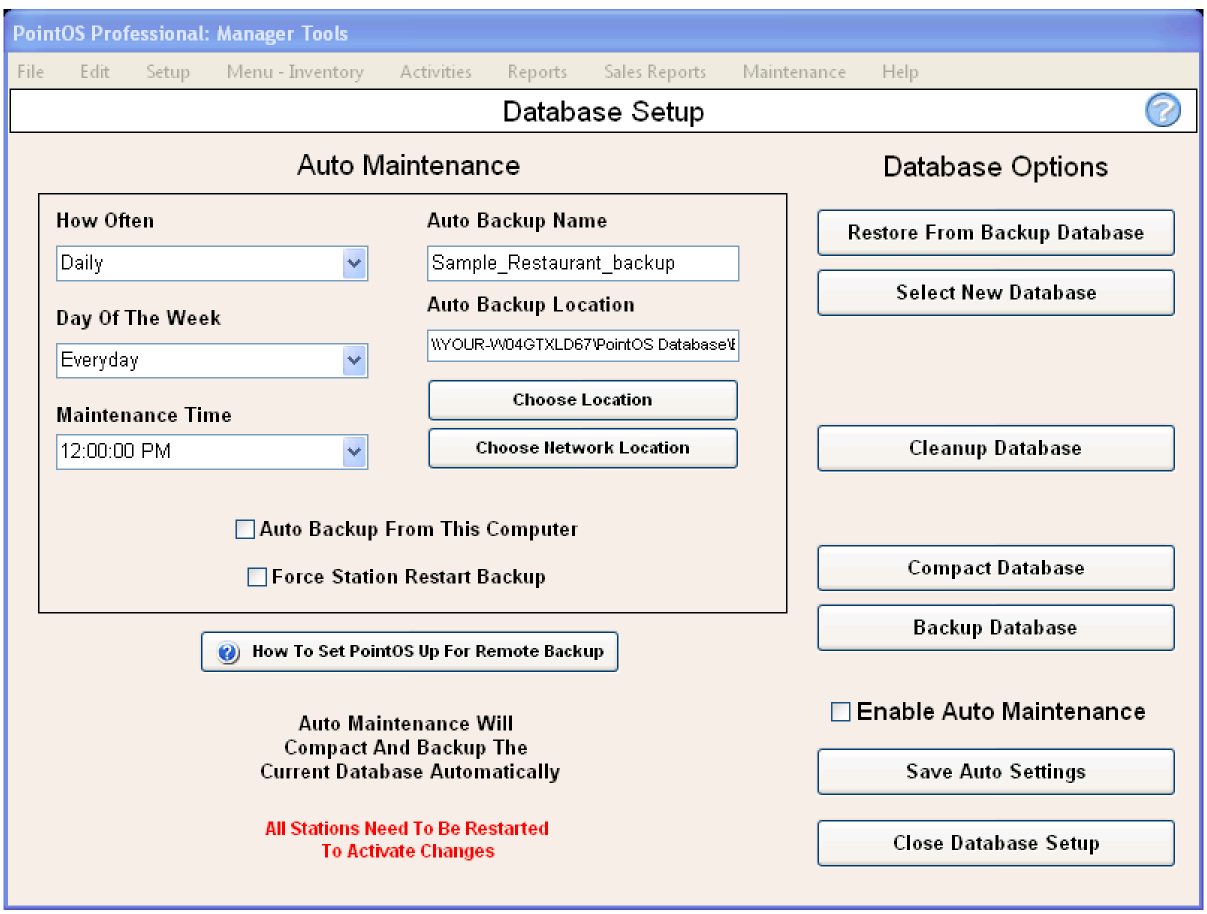


Figure 35: Database Setup

Auto Maintenance

The auto maintenance feature allow you to archive and backup the database automatically. During auto maintenance, items and orders will be archived and credit card pre-authorizations will be deleted. To set up auto maintenance, complete the following steps:

1. Select how often you would like to archive and backup the database automatically from the **How Often** drop down list.

NOTE: We recommend that you perform maintenance at least once a week. However, for higher volume locations, maintaining the database daily will give you optimal performance.

2. Select when to perform the maintenance. The options change, depending on what you selected in **How Often**:
   - If you selected Daily, the only option under **Day of the Week** is Everyday.
   - If you selected Weekly, select the day you choose from the **Day of the Week** drop down list.
   - If you selected Monthly, select the day of the month you choose from the **Day of the Month** drop down list.

NOTE: Choose a time when no one else will be using PointOS, but when the database station will be running.

3. Enter the time to perform the maintenance in the Maintenance Time field. Refer to the " the Time" section in this Manager Manual for more information on using the clock to set the time.
4. Enter the name of the backup file in the **Auto Backup Name** field.
5. To select an **Auto Backup Location**, select **Choose Location**. The system opens a *Select Directory dialog* box. Select the location for the backup file. The default backup location is *c:/program files/ PointOS Professional/Database/Backup*. However, we recommend that you back up to removable media such as a external drive, in case something happens to your computer.
6. Select **OK** to choose the selected location, or select **Cancel** to close the dialog.
7. Check the **Auto Backup from This Computer** box from the computer you want to use for backing up the database. It must be running as the PointOS server (database). Only one station can be set to auto backup. Be sure that computer is running at the time you choose for the auto backup.
8. Check the **Force Station Restart Backup** box to require other stations to restart after backup. This is not necessary. However, restarting PointOS Professional regularly can keep it running faster.
9. Check the **Enable Auto Maintenance** box.
10. Select **Save Auto Maintenance** or select **Close Database Setup** to close the screen without saving the settings.

Manual Database Options

The **Database Options** area allows you to perform many database functions manually from one common screen.

Select **Restore from Backup Database** to restore the database using a backup file. Refer to the "Restore Database" section in this Manager Manual for more information.

NOTE: Restoring from a backup database is only for emergency data recovery.

Choose **Select New Database** to restart PointOS using a different database. Refer to the "Select Database" section in this Manager Manual for more information.

To clean up the database, select **Cleanup Database**. Refer to the "Database Cleanup" section in this Manager Manual for more information.

To compact the database, select **Compact Database**. The system takes a few moments to compact the database.

You may want to perform a manual database backup when you have made a large change to the system (i.e., you just added a large amount of menu items). First, you may want to disconnect all stations. (Refer to the "Disconnect Stations" section in this Manager Manual for more information.) To perform a manual backup of the database, select **Backup Database**. Refer to the "Backup Database" section in this Manager Manual for more information.

Back Up Remote Computer

Select **How to Set PointOS Up for Remote Backup** for a link to the Microsoft website for instructions to enable backups to network drives.

Security Settings

The *Security Settings* screen allows you to control how your employees access different areas of PointOS. It sets the minimum security level required for an employee to do each feature.

NOTE: You can set each employee's security level from the *Employee Setup* screen. Refer to the "Setup" section in this Manager Manual for more information.

To open the *Security Settings* screen, select **Security Settings** from the **Setup** menu.

The system displays the *Security Settings* screen.

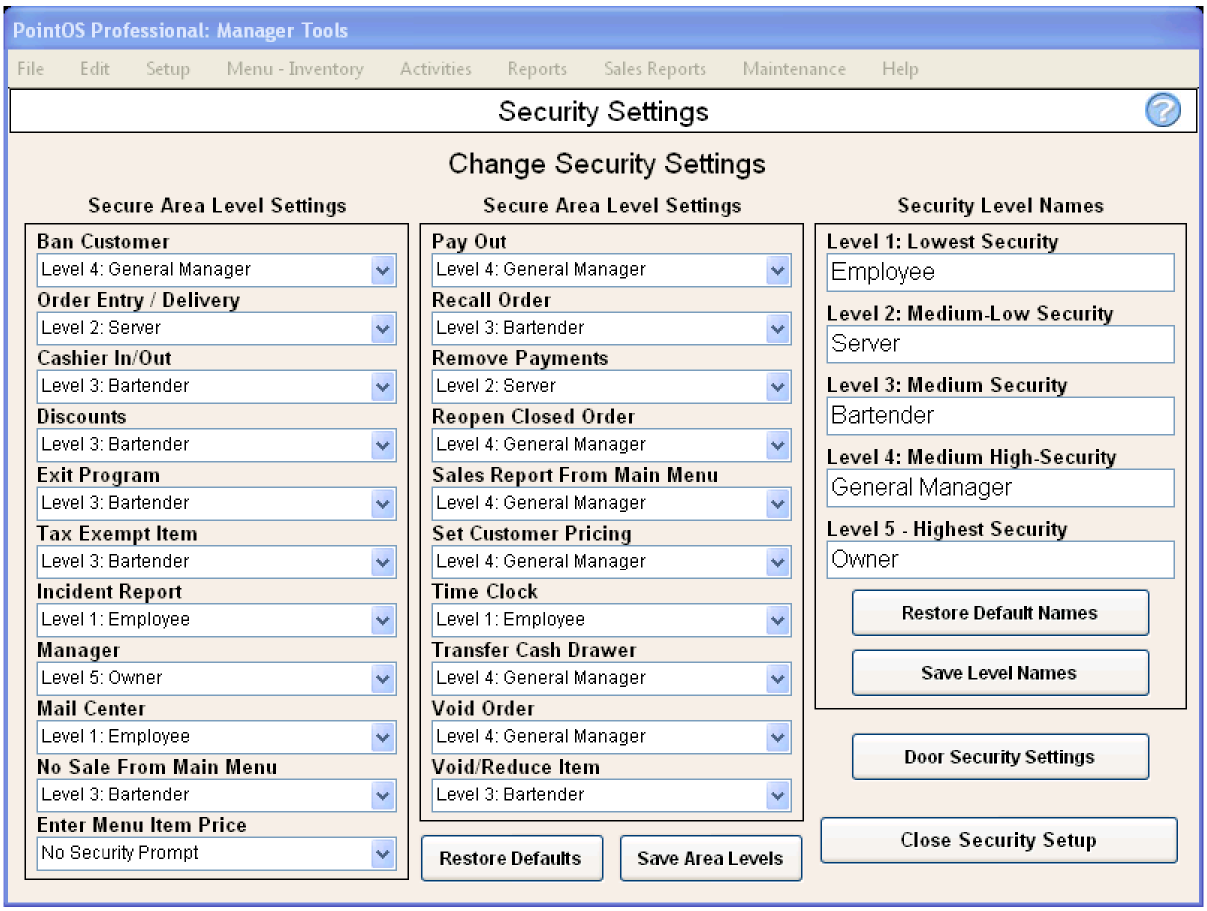


Figure 36: Security Settings Screen

First, define the *Security Level Names* (right side of the screen). Complete the following steps:

1. Update each **Security Level Name** for the five levels of security available in PointOS.
2. If you have changed the security level names and want to restore the default names, select **Restore Default Names**.
3. When you have finished updating the names to reflect your establishment, select **Save Level Names**.

Next, you define a security setting for each type of activity in PointOS.

1. Select a **Secure Area Level Setting** from each activity's drop down list.
2. If you have changed security levels for activities, and want to restore the default security settings, select **Restore Default Levels**.
3. When you have finished updating the security levels to reflect your needs, select **Save Secure Area Levels**.

When you have finished defining security levels, select **Close Security Setup**.

Cash Back Settings

The *Cash Back Settings* screen enables your customers to pay for their orders with a debit card and receive cash back.

To open the *Cash Back Settings* screen, select **Cash Back Settings** from the **Setup** menu.

The system displays the *Cash Back Settings* screen.

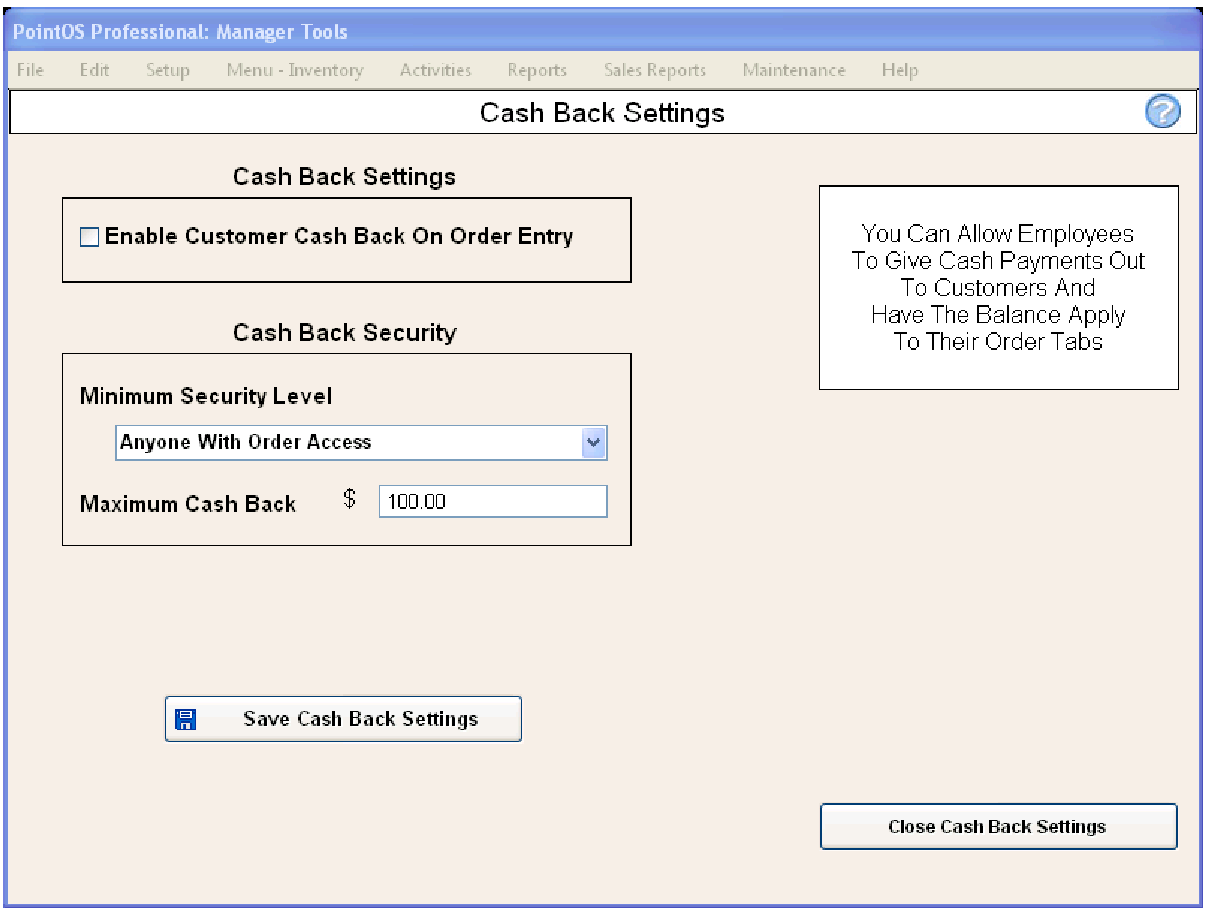


Figure 37: Cash Back Settings Screen

To enable the cash back feature, complete the following steps:

1. Check the **Enable Customer Cash Back on Order Entry** box.
2. Select the **Minimum Security Level** from the drop down list.
3. Select the **Maximum Cash Back** a customer can request.
4. Select **Save Cash Back Settings**.
5. Select **Close Cash Back Settings** to close the screen.

Customer Notice Setup

The *Customer Notice Setup* screen allows you to set up notices to your staff about customer sales milestones or automatic birthday emails to customers. You must have email setup to send emails. Refer to the "Email Setup" section in this Manager Manual for more information.

To open the *Customer Notice Setup* screen, select **Customer Notice Setup** from the **Setup** menu.

The system displays the *Customer Notice Setup* screen.

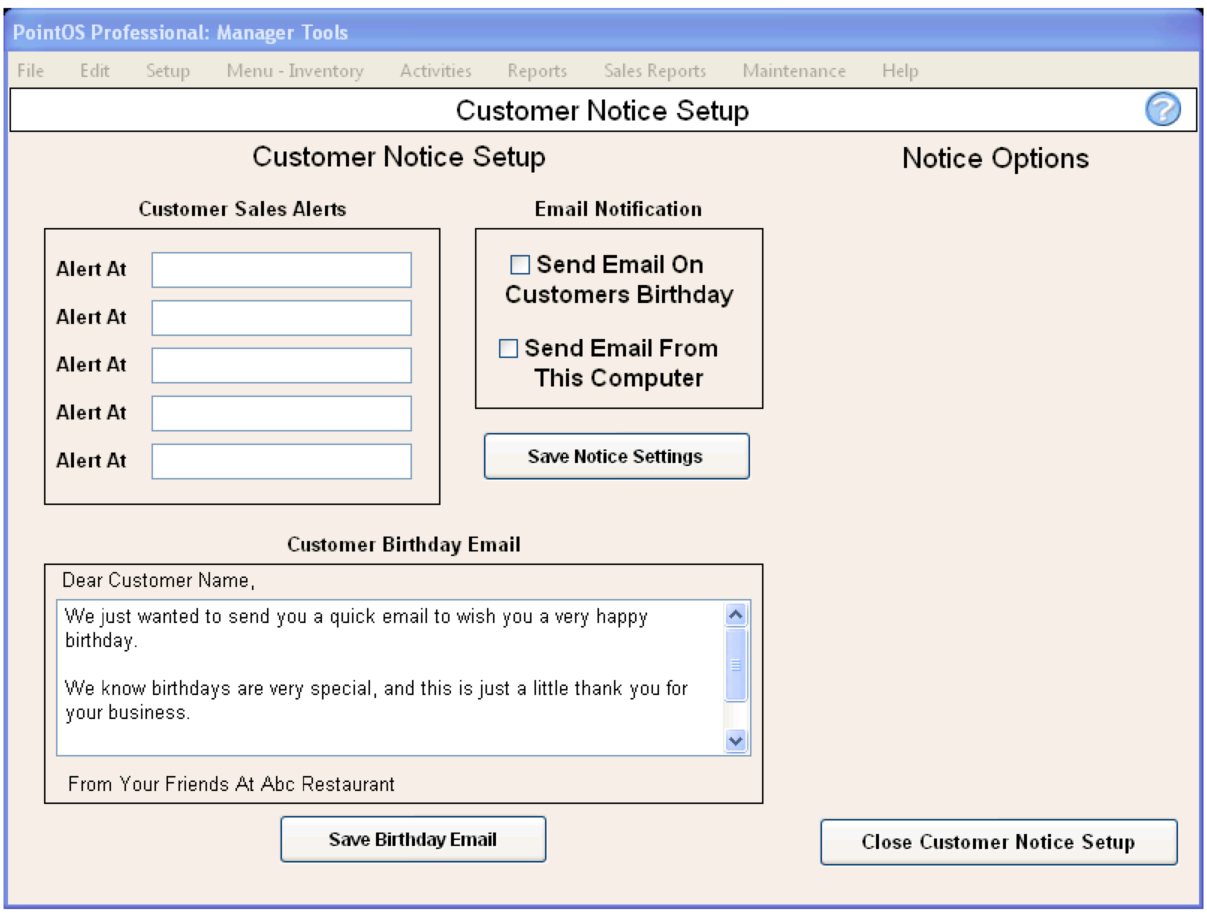


Figure 38: Customer Notice Setup Screen

Customer Sales Alerts

To set up notices to your staff when a customer reaches selected sales milestones, complete the following steps:

1. In each **Customer Sales Alerts** field, enter the sales amount at which you want to notify your sales staff. You can enter the amount in dollars or dollars and cents. You do not need to enter the dollar sign.
2. Select **Save Notice Settings**.

Customer Birthday Emails

To setup customer birthday emails, complete the following steps:

NOTE: You must have email setup to send emails. Refer to the " Setup" section in this Manager Manual for more information.

1. Edit the **Customer Birthday Email** as desired.
2. Select **Save Birthday Email**.
3. Check the **Send Email on Customers Birthday** box.
4. Check the **Send Email from this Computer** box.

Once you setup birthday emails, they will be sent from the selected computer at 6 a.m. every morning.

NOTE: The computer sending the automatic emails must be running at the time you select.

When you have finished using the *Customer Notice Setup* screen, select **Close Customer Notice Setup**.

Delivery Setup

The *Delivery Setup* screen allows you to set up PointOS to take Delivery Orders.

You may want to set up one computer with a phone line to capture the caller ID from your customers. You will need to plug a phone line into that computer's fax/modem port. If your computer does not have a phone port, you can purchase an external modem which can be hooked up by USB.

To open the *Delivery Setup* screen, select **Delivery Setup** from the **Setup** menu.

The system displays the *Delivery Setup* screen.

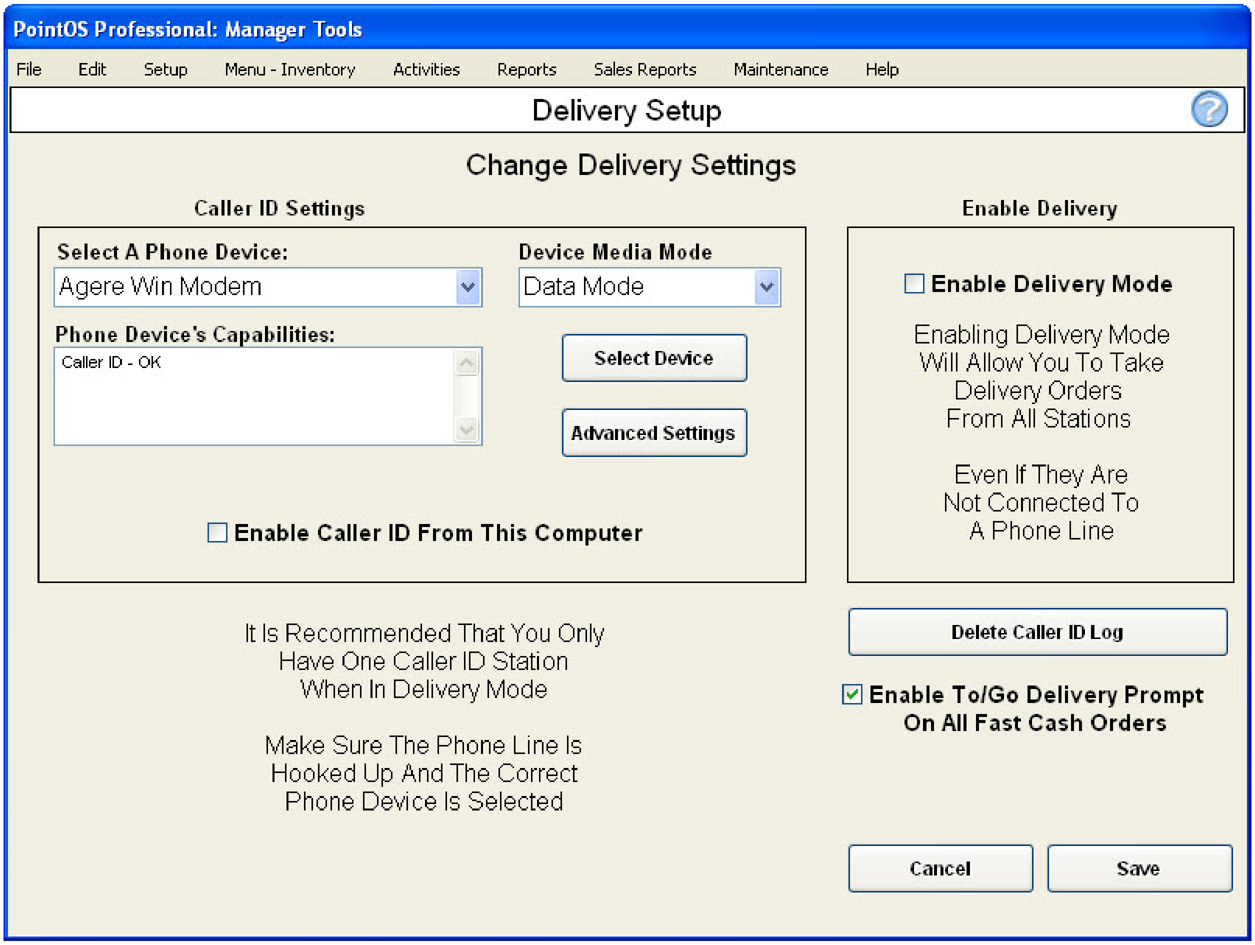


Figure 39: Delivery Setup Screen

To set up deliveries for your PointOS system, complete the following steps:

1. Check the **Enable Delivery Mode** box to add a **Delivery** area to your *Main Menu*.
2. On the computer you will use for deliveries, check the **Enable Caller ID From This Computer** box.
3. Select your phone device from the **Select A Phone Device** drop down list. Make sure you choose a device that has Caller ID capabilities.
4. Select the type of data (Data, Fax, or Voice) your modem accepts from the **Device Data Mode** drop down list.
5. Choose **Select Device**.
6. Check the **Enable To/Go Delivery Prompt on All Fast Cash Orders** box to display the *Select Order Type* screen when **Fast Cash** is selected in *Order Entry*.
7. Select **Save** to save your **Delivery Setup** options or select **Cancel** to close the *Delivery Setup* without saving the changes.

Delete Caller ID Log

The *Delivery Setup* screen also allows you to clear the caller ID log.

1. Select **Delete Caller ID Log**.

The system displays an alert asking if you are sure you want to delete the caller ID log.

2. Select **OK**.

The system displays an alert notifying you that it has deleted the caller ID log.

Advanced Connection Settings

The **Advanced Settings** option allows you to open the Connection Preferences for the selected phone device.

To edit the connection settings, complete the following steps:

1. Select the phone device from the drop down list.
2. Select the **Advanced Settings** button.

The system displays the *Connection Preferences* screen.

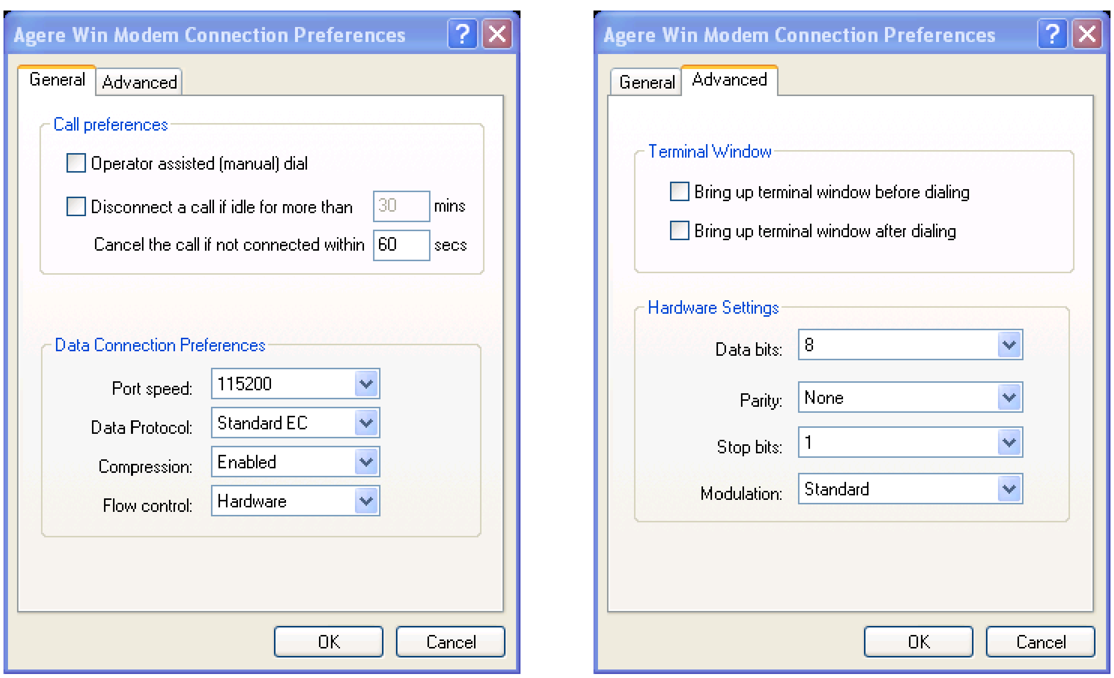


Figure 40: Advanced Connection Settings

Discount Setup

The *Discount Setup* screen allows you to define discounts for various reasons. There is a maximum of seven different types of discounts.

To open the *Discount Setup* screen, select **Discount Setup** from the **Setup** menu.

The system displays the *Discount Setup* screen.

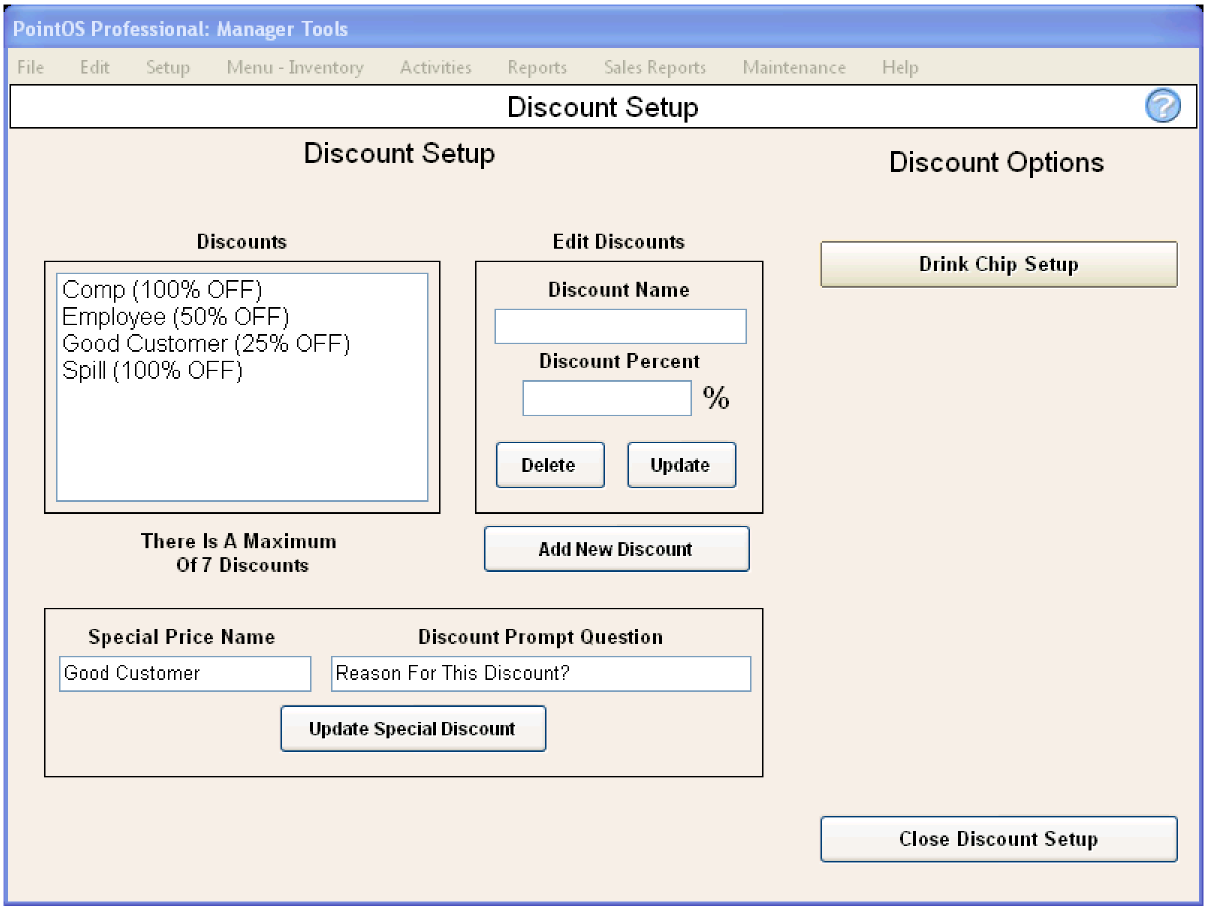


Figure 41: Discount Setup Screen

To define a new discount, complete the following steps:

1. Enter a name for the discount in the **Discount Name** field.
2. Enter the percentage off in the **Discount Percent** field.
3. Select **Add New Discount**.

To edit or delete one of the defined discounts, complete the following steps:

1. Highlight the name of the discount you want to edit in the **Discounts** area.
2. Edit the **Discount Name**, if desired.

3. Edit the **Discount Percent**, if desired.
4. To update the discount, select **Update**. To delete the discount, select **Delete**.

You can include one special price. This links to the Special Price item in the *Menu Setup*. To set up a special price, complete the following steps:

1. Enter the **Special Price Name** (i.e., ITB).
2. Enter question to include in the prompt when giving the discount in the **Discount Prompt Question** field.

When you have finished using the *Discount Setup* screen, select **Close Discount Setup**.

Drink Chip Setup

The *Drink Chip Setup* screen allows you to enable drink chips for certain groups or categories for drink chip discounts.

To open the *Drink Chip Setup* screen, select **Drink Chip Setup** from the **Discount Setup** screen.

The system displays the *Drink Chip Setup* screen.

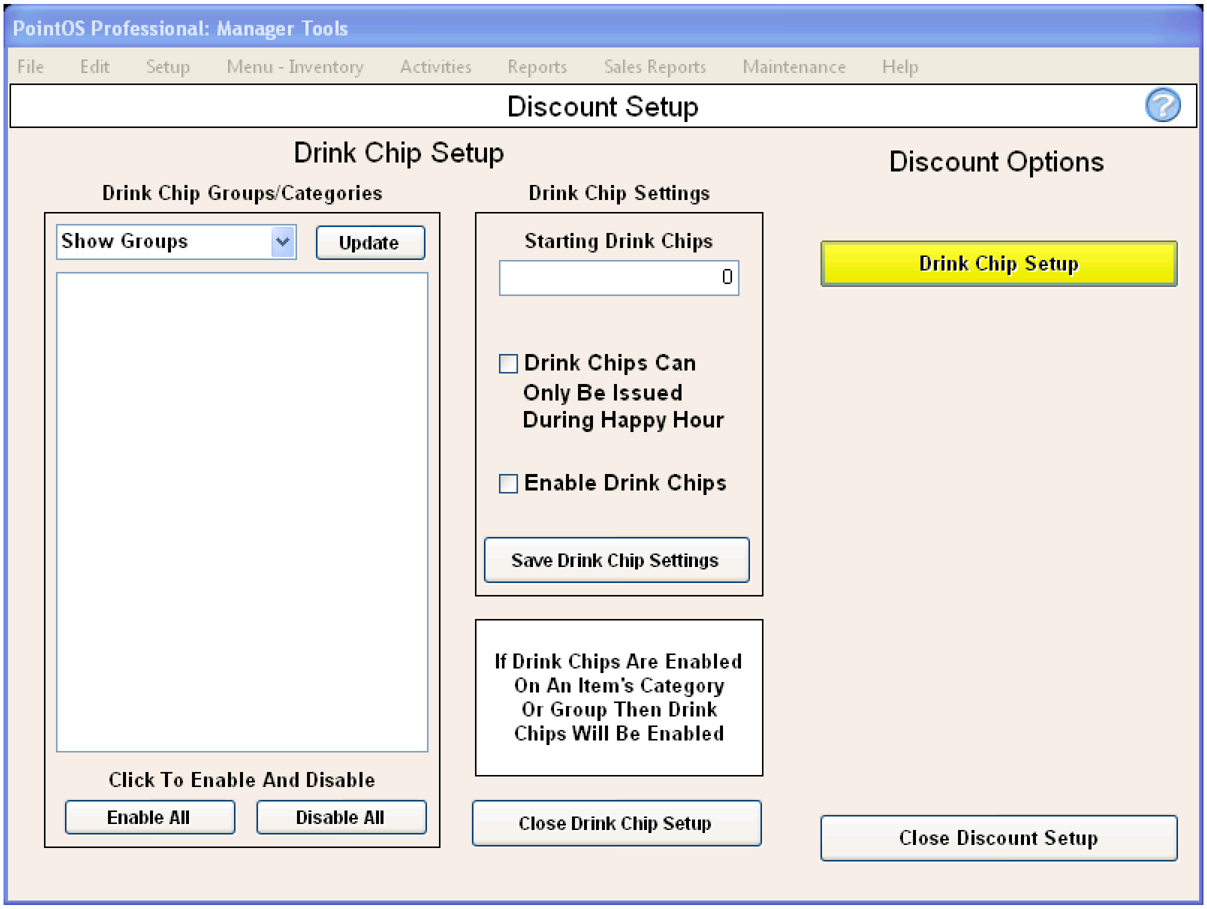


Figure 42: Drink Chip Setup Screen

To set up drink chips, complete the following steps:

1. Select **Groups** or **Categories** from the drop down list and select **Update**.
2. The system displays the groups or categories. Select an item to enable it for drink chips. Or select **Enable All** or **Disable All**.
3. To set a **Starting Drink Chips** amount, enter a number.
4. Check the **Drink Chips Can Only Be Issued During Happy Hour** box, if applicable.
5. Check the **Enable Drink Chips** box to enable drink chips.
6. Select the **Save Drink Chip Settings** button.
7. Select the **Close Drink Chip Settings** to return to the *Discount Setup* screen.
8. Select the **Close Discount Setup** to close the screen.

Email Setup

The *Email Setup* screen allows you to define email for several different features:

- Emailing daily, weekly, and monthly sales reports
- Allowing employees to email each other
- Emailing customers for their birthdays

To open the *Email Setup* screen, select **Email Setup** from the **Setup** menu.

The system displays the *Email Setup* screen.

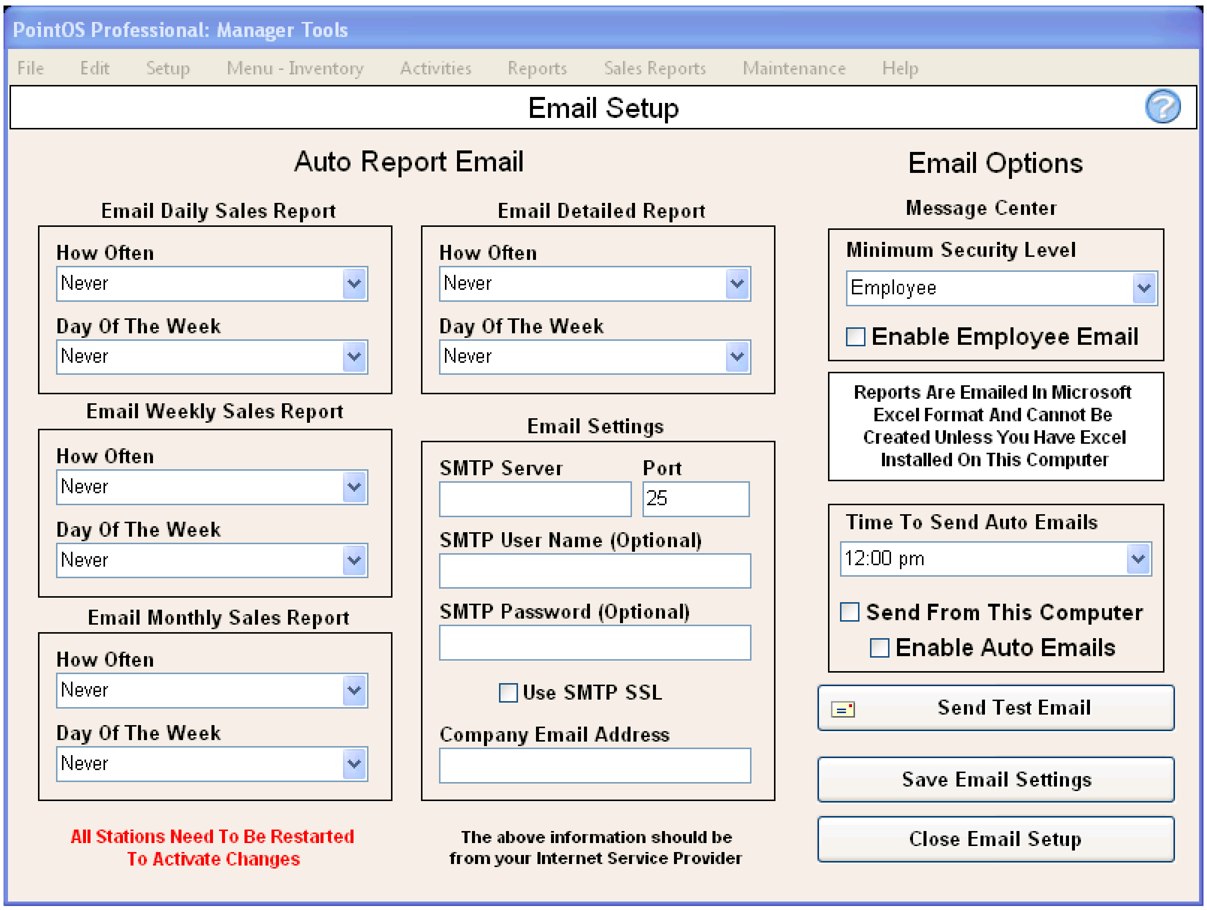


Figure 43: Email Setup Screen

Email Settings

Before you can email reports, customer birthday emails, or enable employee emails, you must setup the email settings.

1. Enter the **SMTP Server** information (Server and Port). This information is available from your internet service provider. Your ISP, or internet service provider, is the company that provides your internet service. It is NOT AOL, Google, or Yahoo.

   Here are a few common SMTP server addresses:

   NOTE: These are subject to change, and many providers have multiple smtp addresses, depending on your geographical location and the type of service you have through them (i.e., DSL vs. Cable modem). Also, some require a certain port, and some require user name and password.

Internet Service Provider	SMTP Address
Adelphia	smtp.blk.adelphia.net
AT&T Worldnet	mailhost.att.net
BellSouth	smtp.blk.adelphia.net
Adelphia	mail.rdu.bellsouth.net
Comcast	smtp.comcast.net
Time Warner RoadRunner	smtp-server.nc.rr.com
AT&T	smtp1.attglobal.net
Bellatlantic.net	smtpout.bellatlantic.net
Charter Pipeline	smtp.charter.net
Cox Communications	smtp.cox-internet.com
Verizon	outgoing.verizon.net

2. If your internet provider requires it, enter your **User Name** to access your internet account.
3. If your internet provider requires it, enter your **Password** to access your internet account.
4. Check the **Use SMTP SSL** box if your internet service provider requires SSL.
5. Enter the **Company Email Address**. This is where any replies to automatic emails are sent.

Auto Report Email

You can have the Daily, Weekly, Monthly and Detailed Sales reports sent to you automatically. The sales reports are in Microsoft Excel© format. You must have Microsoft Excel© installed on the computer that sends the sales reports.

To have the sales report emailed to you, complete the following steps:

1. For each type of report, select an item from the **How Often** drop down list. Select **Never** if you do not want to receive that sales report, but you want to enable automatic emailing of the other reports.
2. Depending on whether you selected Daily, Weekly, or Monthly as **How Often**, select an item from the **Day of the Week** or **Day of the Month** drop down list to indicate when to email the report.
3. Select what time to email the reports in the **Time to Send Auto Emails** drop down list. Refer to the "the Time" section in this Manager Manual for more information on using the clock to set the time.
4. Check the **Send from This Computer** box to indicate which computer to use to send the emails. The computer must have Microsoft Excel© installed to send sales reports.
5. Check the **Enable Auto Emails** box to send automatic emails of sales reports as you have indicated.
6. Select **Send Test Email** to send a test email for checking the settings.

Message Center

You can allow employees to email each other through the system. These emails are sent to the email addresses used in the *Employee Setup*. The email addresses remain hidden from the sender and the recipient, and all addresses have the company return address to protect the privacy of your employees.

To setup employee email, complete the following steps:

1. Select the required **Security Level to Send Email** from the drop down box to indicate who can send employee emails.
2. Check the **Enable Employee Email** box to activate the employee email functionality.

Save Email Settings

When you have finished with the email settings, select **Save Email Settings**.

The system displays a message notifying you that the settings have been saved. Then it returns to the Manager Dashboard.

If you want to close the *Email Settings* screen without saving changes, select **Close Email Setup**.

Music Setup

The *Music Setup* screen controls how music is played, requested, and found.

To open the *Music Setup* screen, select **Music Setup** from the **Setup** menu.

The system displays the *Music Setup* screen.

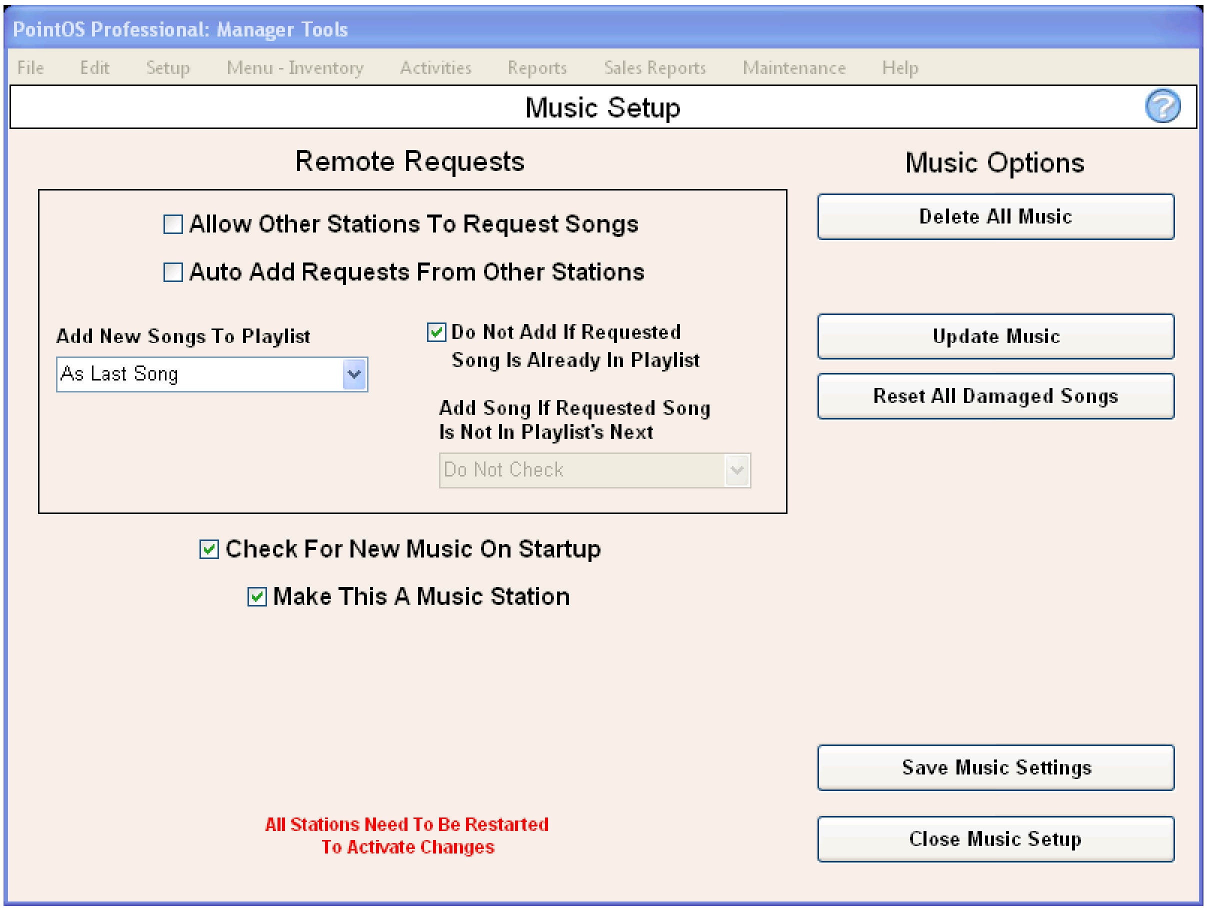


Figure 44: Music Setup Screen

Music Options

There can only be one music station. You must have a music station for some of these options to work. To set up the current system as a music station, complete the following steps:

1. Check the **Make This a Music Station** box to indicate the computer to use as the music station and DJ for music requests.
2. To automatically add new music when the system starts up, select the **Check For New Music On Startup** box. The system will add any new music from Windows Media Player automatically, each time you start PointOS.

NOTE: Make sure any playlists intended for use with PointOS begin with a +. Refer to the "Setting Up Music" section in this Manager Manual for more information.

3. To delete music from PointOS so that you can start over with new music, select **Delete All Music**.
4. To manually update new music from Windows Media Player, select **Update Music**.
5. When a song will not play, the system tags it as damaged. PointOS does not delete or change the song, but the song will no longer come up in searches or playlists. Select **Reset All Damaged Songs** to reset the songs. However, we do not recommend using this setting. As you use the system, the damaged songs will cycle out of PointOS.

Remote Requests

To allow other cash register stations to make song requests, complete the following steps:

1. Check the **Allow Other Stations To Request Songs** box to enable remote requests.
2. Check the **Auto Add Requests From Other Stations** box to set the music station to serve as automatic D.J. for music requests.
3. For automatic requests, where to add the requested song in the current playlist by selecting either **First Song** or **Last Song** from the **Add New Songs to Playlist** drop down list.
4. Check the **Do Not Add If Requested Song Is Already in Playlist** box to avoid duplicates of a song in the playlist.
5. If the **Do Not Add If Requested Song Is Already is Playlist box** is UNCHECKED, you can select where in the playlist to add the song (either the next song or the last song on the list). Select an option from the **Add Song If Requested Song Is Not In Playlist's Next** drop down list.

Save Music Setup

When you have finished with the music setup, select **Save Music Settings**.

The system displays a message notifying you that the settings have been saved. Then it returns to the *Manager Dashboard*.

If you want to close the *Music Setup* screen without saving changes, select **Close Music Setup**.

Payroll Setup

The *Payroll Setup* screen allows you to define multiple job descriptions for various hourly rates for an employee to use when he or she clocks in. It also defines the default salary levels used in the *Employee Setup* screen.

To open the *Payroll Setup* screen, select **Payroll Setup** from the **Setup** menu.

The system displays the *Payroll Setup* screen.

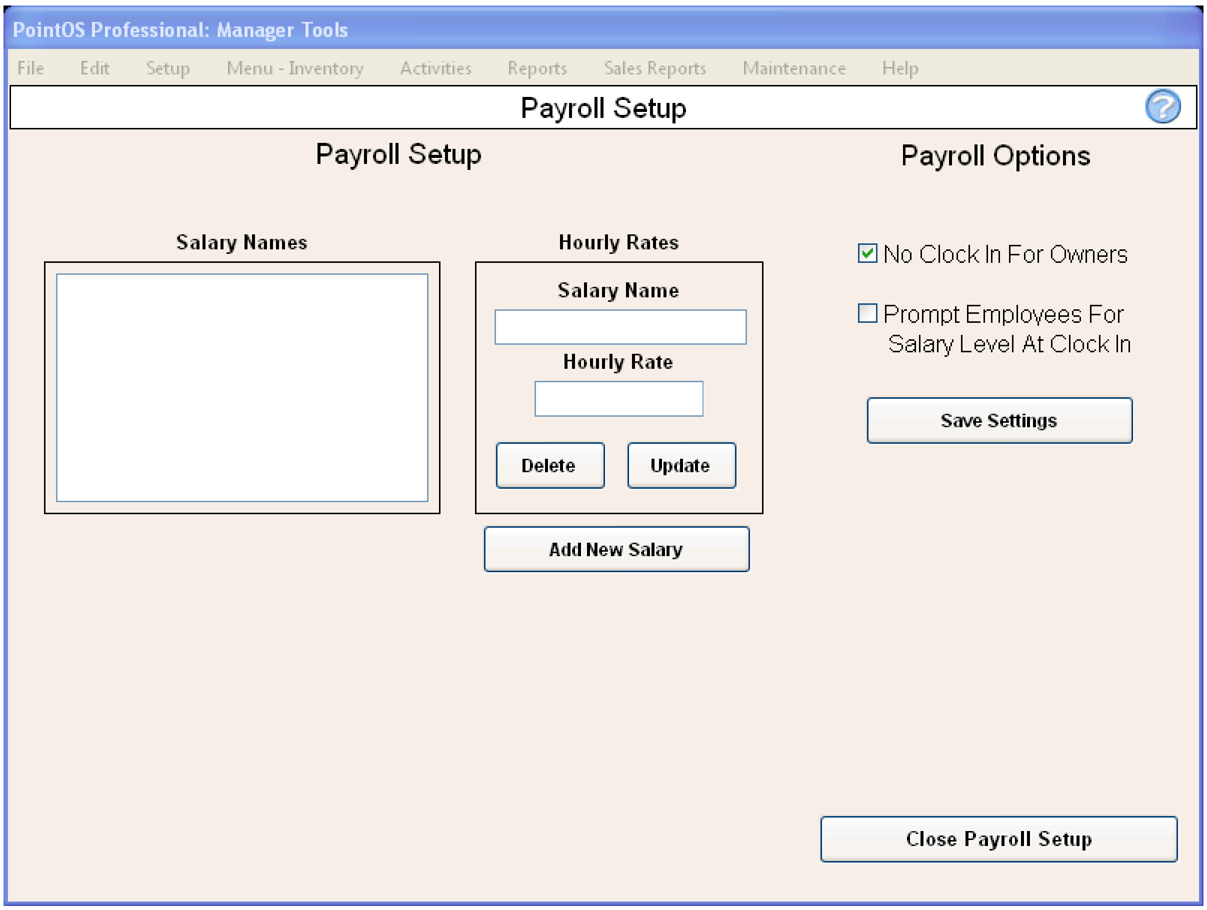


Figure 45: Payroll Setup Screen

To define a new job description pay rate, complete the following steps:

1. Enter a name for the salary in the **Salary Name** field.
2. Enter the hourly rate in the **Hourly Rate** field.
3. Select **Add New Salary**.

To edit or delete one of the defined salaries, complete the following steps:

1. Highlight the name of the salary you want to edit in the **Salary Names** area.
2. Edit the **Salary Name**, if desired.
3. Edit the **Hourly Rate**, if desired.
4. To update the salary, select **Update**. To delete the salary, select **Delete**.

Once you have created your salaries, check the **Prompt Employees For Salary At Clock In** box to have employees select from multiple applicable salaries at clock in. To use employees' default salary levels, leave the box unchecked. If desired, check the **No Clock In For Owners** box so that the system does not use time clock features for owners.

Select **Save Settings** to save the new or updated payroll settings.

When you have finished using the Payroll Setup screen, select **Close Payroll Setup**.

Report Setup

The *Report Setup* screen allows you to define locations in your establishment, weather conditions specific to your area, and reasons for not scanning an ID specific to your needs. These items appear on incident, opening, and closing reports.

To open the *Report Setup* screen, select **No ID, Void, Location Setup** from the **Setup** menu.

The system displays the *Report Setup* screen.

Define Report Locations

Locations are used throughout reporting and with menu items and inventory items.

To open the *Change Location Areas* screen, select **Location Areas** under **Report Options**.

The system displays the **Change Location Areas** information.

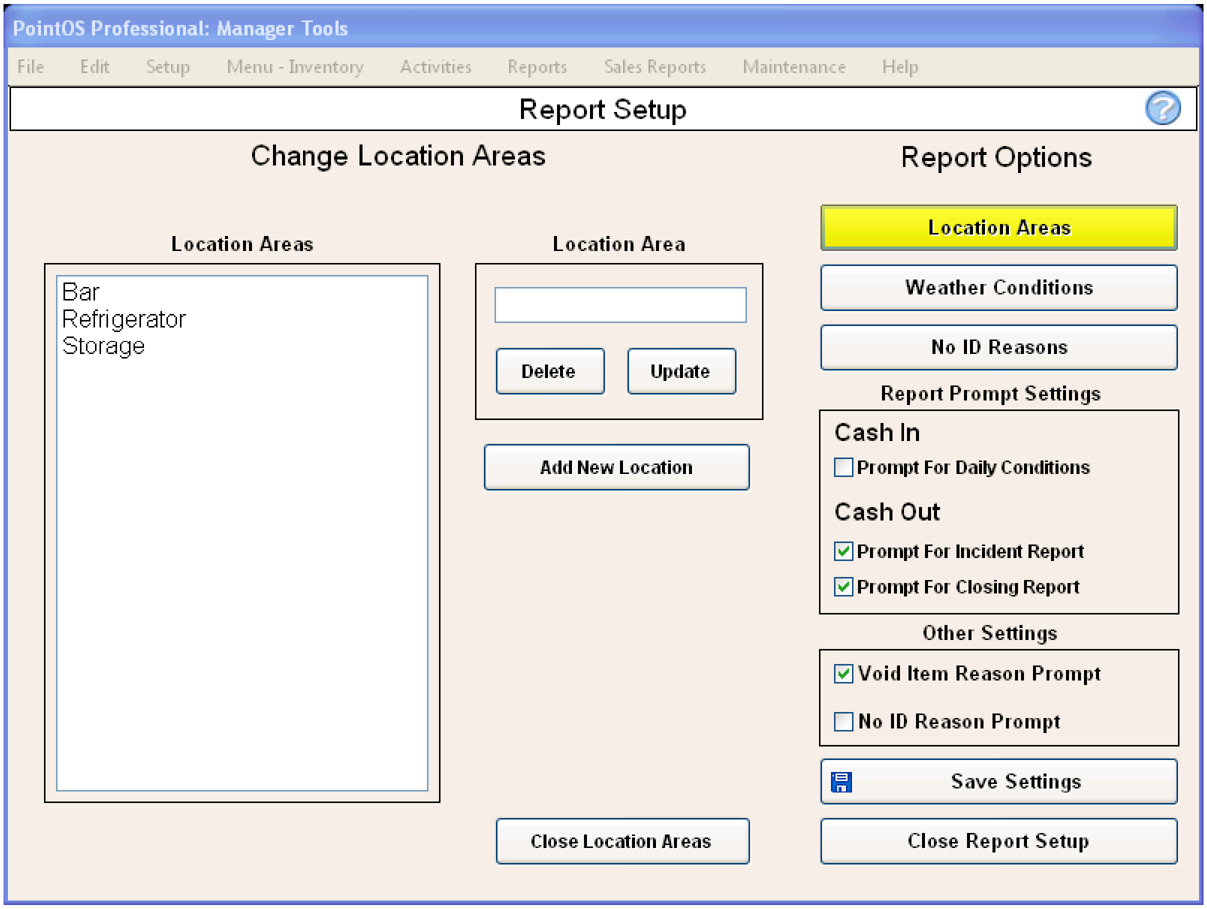


Figure 46: Report Setup Screen Change Location Areas

To add a new location, complete the following steps:

1. Select **Add New Location**.
2. The system displays an *Add New Location Area* dialog box. Enter the name of the new location.
3. Select **OK** to save the new location, or select **Cancel** to close the dialog box without saving.

To edit an existing location, complete the following steps:

1. Highlight the name of the location you want to edit from the **Location Area** list.
2. Edit the location name, if desired.
3. To update the location, select **Update**. To delete the location, select **Delete**.

When you have finished working with **Location Areas**, select **Close Location Areas**.

Define Weather Conditions

To open the *Change Weather Condition List* screen, select **Weather Conditions** under **Report Options**.

The system displays the *Change Weather Condition List* screen.

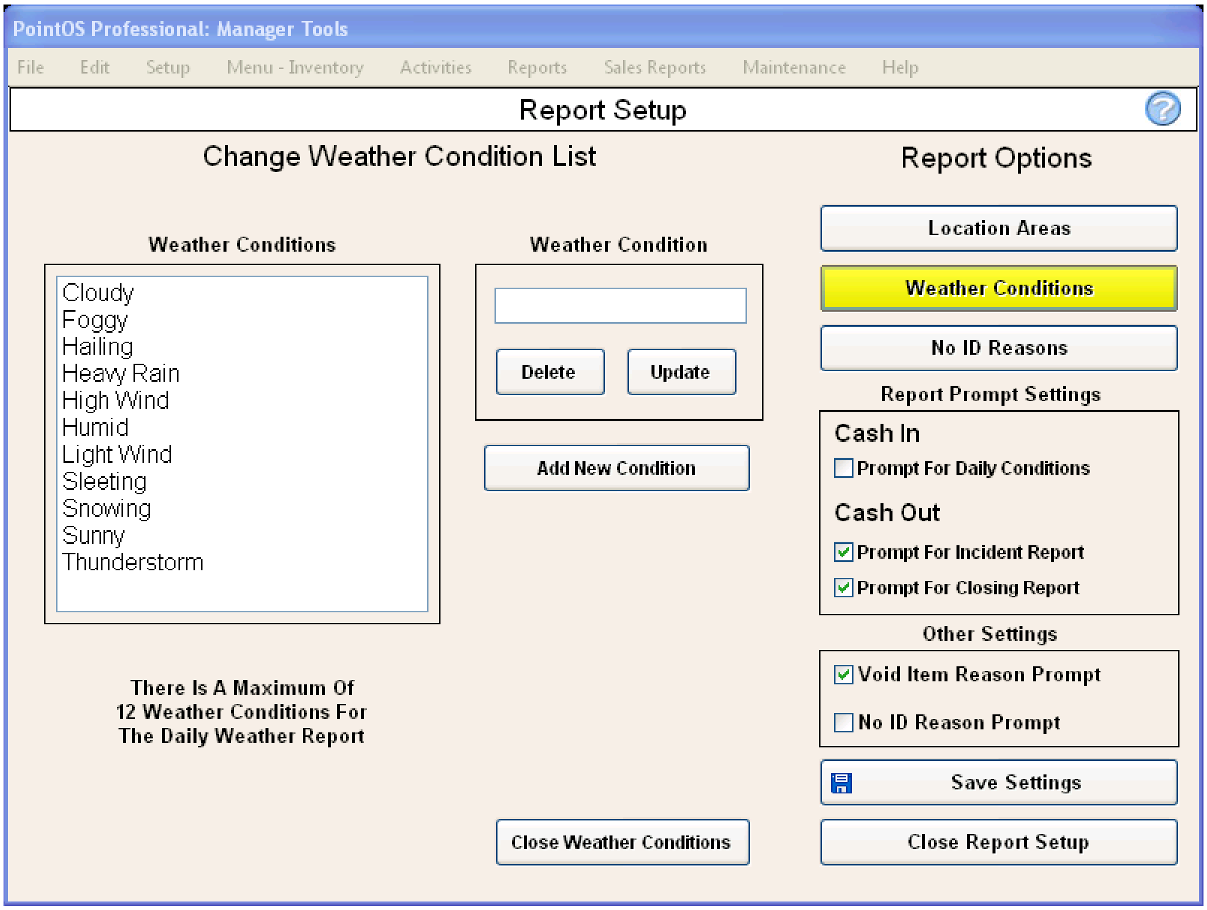


Figure 47: Weather Condition List

To add a new weather condition, complete the following steps:

NOTE: There is a maximum of 12 Weather Conditions. If you have already added weather conditions, you cannot add more than 12. You must delete or update other conditions instead.

1. Select **Add New Condition**.
2. The system displays an *Add New Weather Condition* dialog box. Enter the name of the new weather condition.
3. Select **OK** to save the new weather condition, or select **Cancel** to close the dialog box without saving.

To edit an existing weather condition, complete the following steps:

1. Highlight the name of the weather condition you want to edit from the **Weather Conditions**.
2. Edit the weather condition name, if desired.
3. To update the weather condition, select **Update**. To delete the weather condition, select **Delete**.

When you have finished working with Weather Conditions, select **Close Weather Conditions**.

Define No ID Reasons

The No ID Reasons are the options that are displayed when a tab is started without scanning an ID.

To open the *No ID Reason Setup* screen, select **No ID Reasons** under **Report Options**.

The system displays the *NO ID Reason Setup* screen.

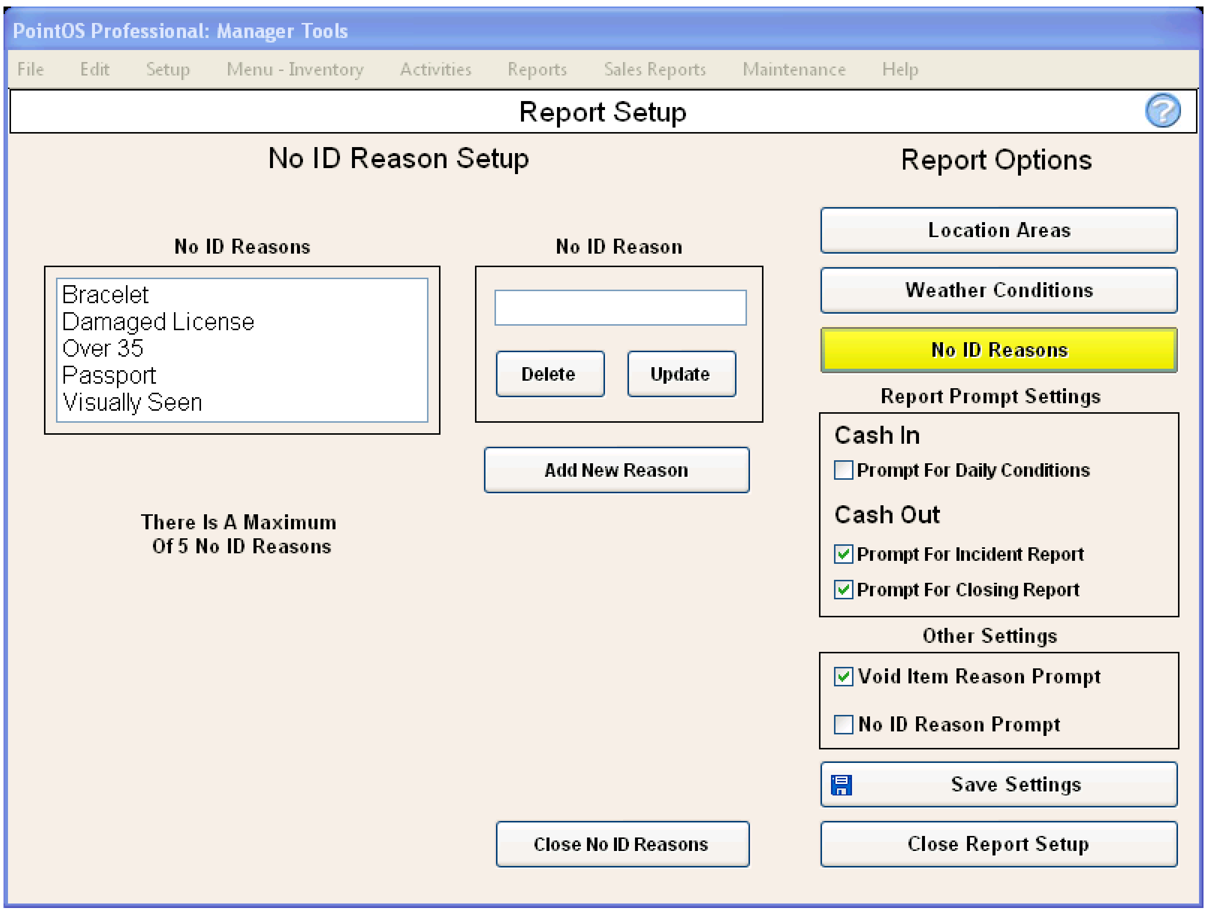


Figure 48: No ID Reason Setup

To add a new reason, complete the following steps:

NOTE: There is a maximum of 5 No ID Reasons. You must delete one of the existing reasons before you can add a new one.

1. Select **Add New Reason**.
2. The system displays an *Add New No ID Reason* dialog box. Enter the name of the new reason.
3. Select **OK** to save the new reason, or select **Cancel** to close the dialog box without saving.

To edit an existing reason, complete the following steps:

1. Highlight the name of the reason you want to edit from the **No ID Reasons** area.
2. Edit the reason name, if desired.
3. To update the reason, select **Update**. To delete the reason, select **Delete**.

When you have finished working with No ID Reasons, select **Close No ID Reasons**.

Report Prompt Settings

Check the **Prompt for Daily Conditions** box to track weather conditions when cashing in.

Check the **Prompt for Incident Report** box to prompt for completing an incident report at cash out.

Check the **Prompt for Closing Report** box to prompt for completing a closing report at cash out.

Check the **Void Item Reason Prompt** box to require a reason when items are voided.

Check the **No ID Reason Prompt** box to require a reason when a customer does not have an ID to scan.

Save Settings

Select **Save Settings** to save changes made on this screen.

When you have finished, select **Close Report Setup**.

Room Setup

The *Room Setup* screen allows you to define the layout of your establishment. This is used instead of or in addition to the *Tabs* screen to give a visual representation of the table layout. Once you have set up your rooms, you can start or edit a tab by clicking on that table in the *Open Orders* screen.

To open the *Room Setup* screen, select **Room Setup** from the **Setup** menu.

The system displays the *Room Builder* screen.

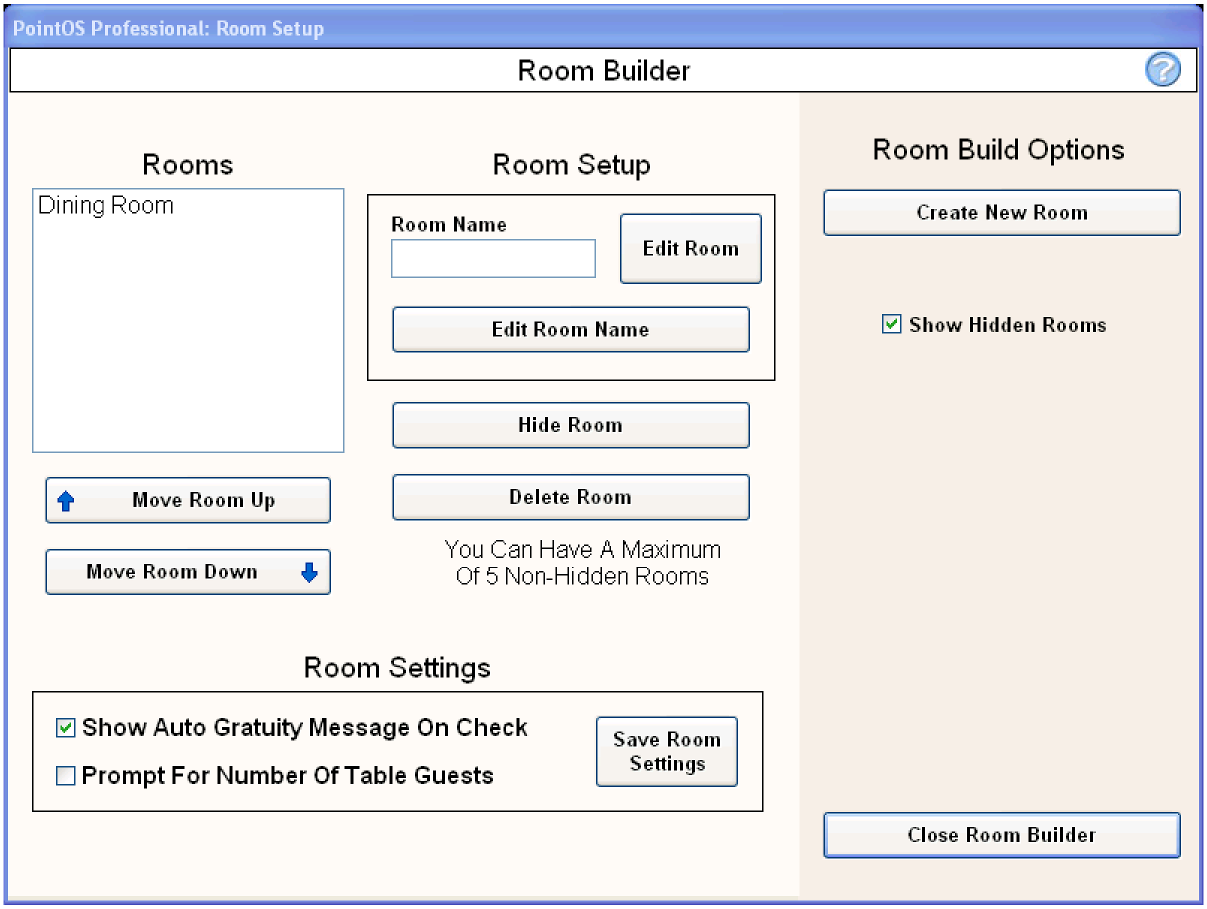


Figure 49: Room Builder Screen

Define Rooms

To define a new room, select **Create New Room** under **Room Build Options**.

The system adds a room to the Rooms list with a default name.

NOTE: There is a maximum of 5 visible rooms.

Edit Room Names

To edit a room name, complete the following steps:

1. Highlight the name of the room you want to edit from the **Rooms** area.
2. Edit the room name, if desired.
3. Select **Update Room Name**. To delete the room, select **Delete Room**.

Control Room Appearance on Orders Screen

The rooms appear on the **Open Orders** screen from left to right. To change the order, complete the following steps:

1. Highlight the name of the room you want to move from the **Rooms** area.
2. Select **Move Room Up** to move the room to the left on the *Open Orders* screen.
3. Select **Move Room Down** to move the room to the right on the *Open Orders* screen.

Hide Rooms

1. Highlight the name of the room you want to hide from the **Rooms** area.
2. Select **Hide Room** to remove the room from the *Orders* screen without deleting it.

If you have the **Show Hidden Rooms** box checked, the **Rooms** list includes the hidden room with a note indicating that it is hidden. If the box is unchecked, the hidden room is not shown on the **Rooms** list.

To un-hide a room, complete the following steps:

1. Highlight the name of the room you want to un-hide from the **Rooms** area.
2. Select **Un-Hide Room**.

Define Tables

You can define the shape, size, and orientation of tables in your rooms. Complete the following steps:

1. Highlight the name of the room for which you want to create tables from the Rooms area.
2. Select **Edit Room**.

The system displays the **Room Builder** screen for the selected room.

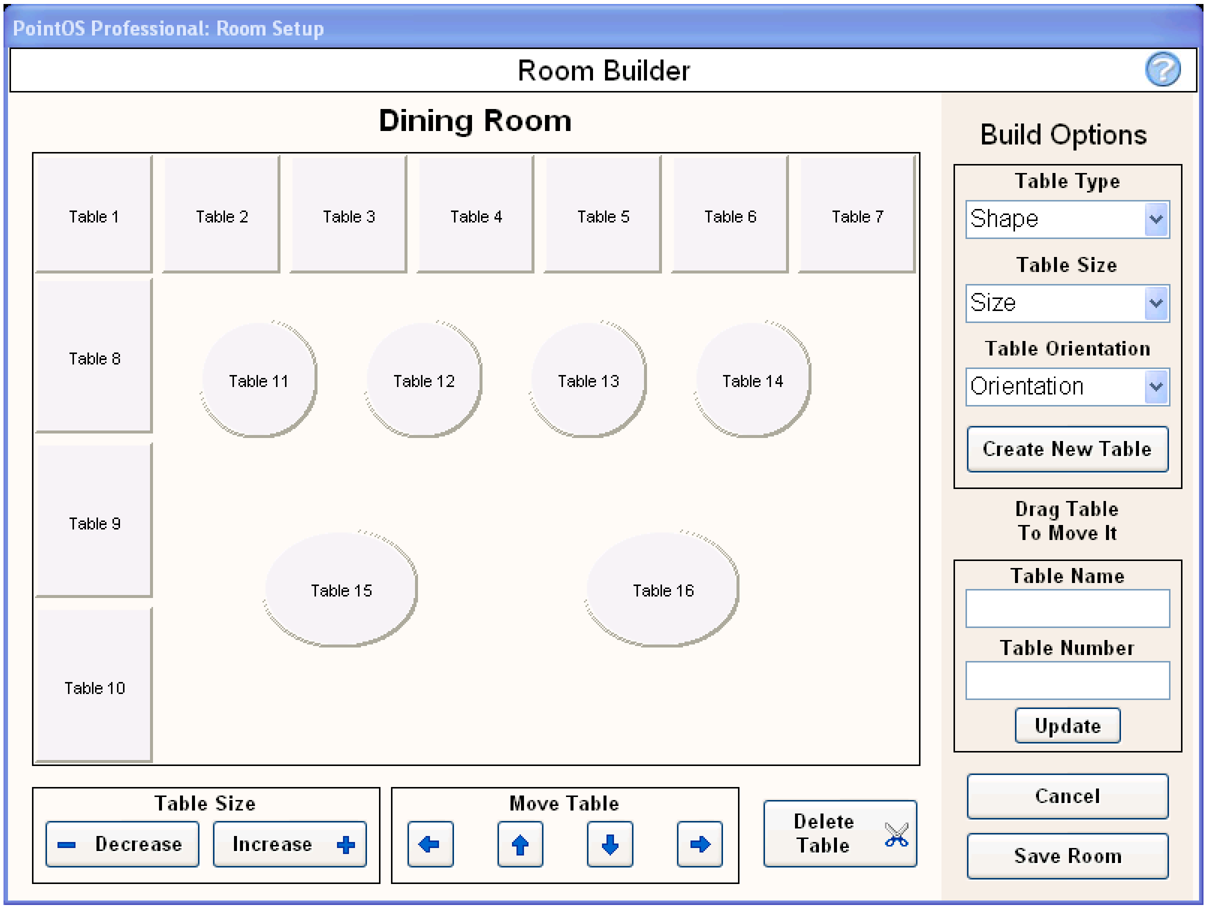


Figure 50: Room Builder Screen (Tables)

3. For each table you want to position, complete the following steps:
   - Choose the **Table Type** by selecting an option from the **Shape** drop down list.
   - Select the **Table Size**.
   - Select an option for the **Table Orientation**.
   - Select **Create New Table**.

The system displays a new table in the room.

4. To change the Table Size, select **Decrease** or **Increase** under **Table Size**.
5. To move the table, select one of the directional arrows under **Move Table**. You can also just drag the table to move it.

7. To modify the table name, complete the following steps:
   - Highlight the table.
   - Update the **Table Name**.
   - Update the **Table Number**.
   - Select **Update**.
8. To delete the table, highlight the table and select **Delete Table**.

When you have finished with the room setup, select **Save Room**. If you want to close the Room Builder screen without saving changes, select **Cancel**.

The system displays a message notifying you that the settings have been saved. Then it returns to the *Room Setup* screen.

Server Mode Setup

The *Server Mode* screen allows you to control how the POS works when in server mode. Server mode stations do not include a cash drawer. You can put a station into server mode from the **Station Settings** area of the *Manager Dashboard*.

To open the *Server Mode Setup* screen, select **Server Mode Setup** from the **Setup** menu.

The system displays the *Server Mode Setup* screen.

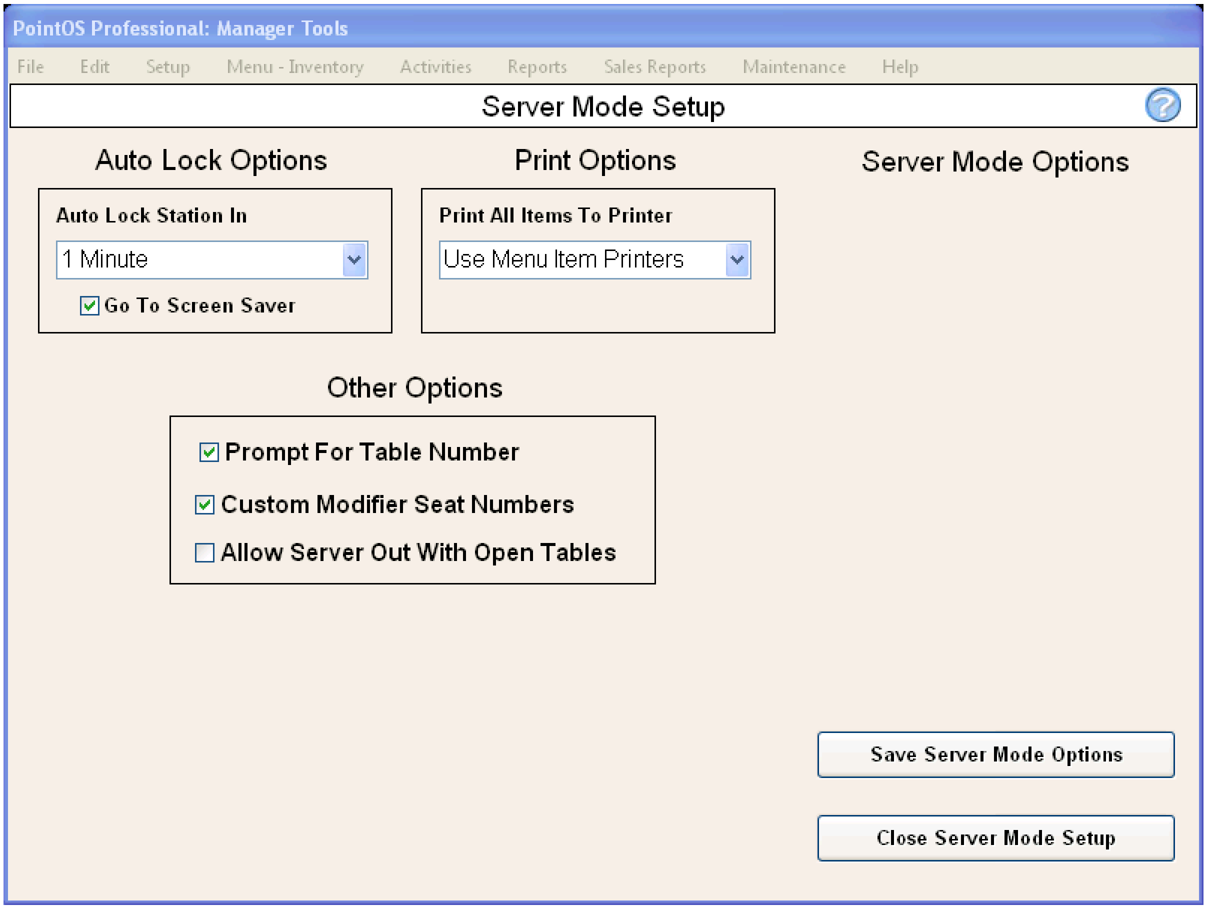


Figure 51: Server Mode Setup Screen

To adjust your server mode settings, complete the following steps:

1. Select the amount of time to allow before locking the screen automatically from the **Auto Lock Station In** drop down list.
2. Check the **Go To Screen Saver** box to start the screen saver at that time. You can change your screen saver from the Windows Display Control Panel.
3. Select which printer to automatically send items ordered on a server mode station from the **Print All Items** drop down list. Refer to the " Up a Generic Driver for Receipt Printing" section in this Manager Manual for more information about setting up printers on the server station.
4. Check the **Prompt For Table Number** box to enable a prompt for the table number.
5. Check the **Custom Modifier Seat Numbers** box to allow seat numbers for customers with custom modifiers.
6. Check the **Allow Server Out with Open Tables** box to allow the server to cash out even with open tables.

When you have finished with the server mode options, select **Save Server Mode** Options.

The system displays a message notifying you that the settings have been saved. Then it returns to the *Manager Dashboard*.

If you want to close the *Server Mode Setup* screen without saving changes, select **Close Server Mode Setup**.

Customer Data Setup

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Customer Data Setup* screen allows you to indicate the required fields when entering a new customer and to define two additional custom fields.

To open the *Customer Data Setup* screen, select **Customer Data Setup** from the **Setup** menu.

The system displays the *Customer Data Setup* screen.

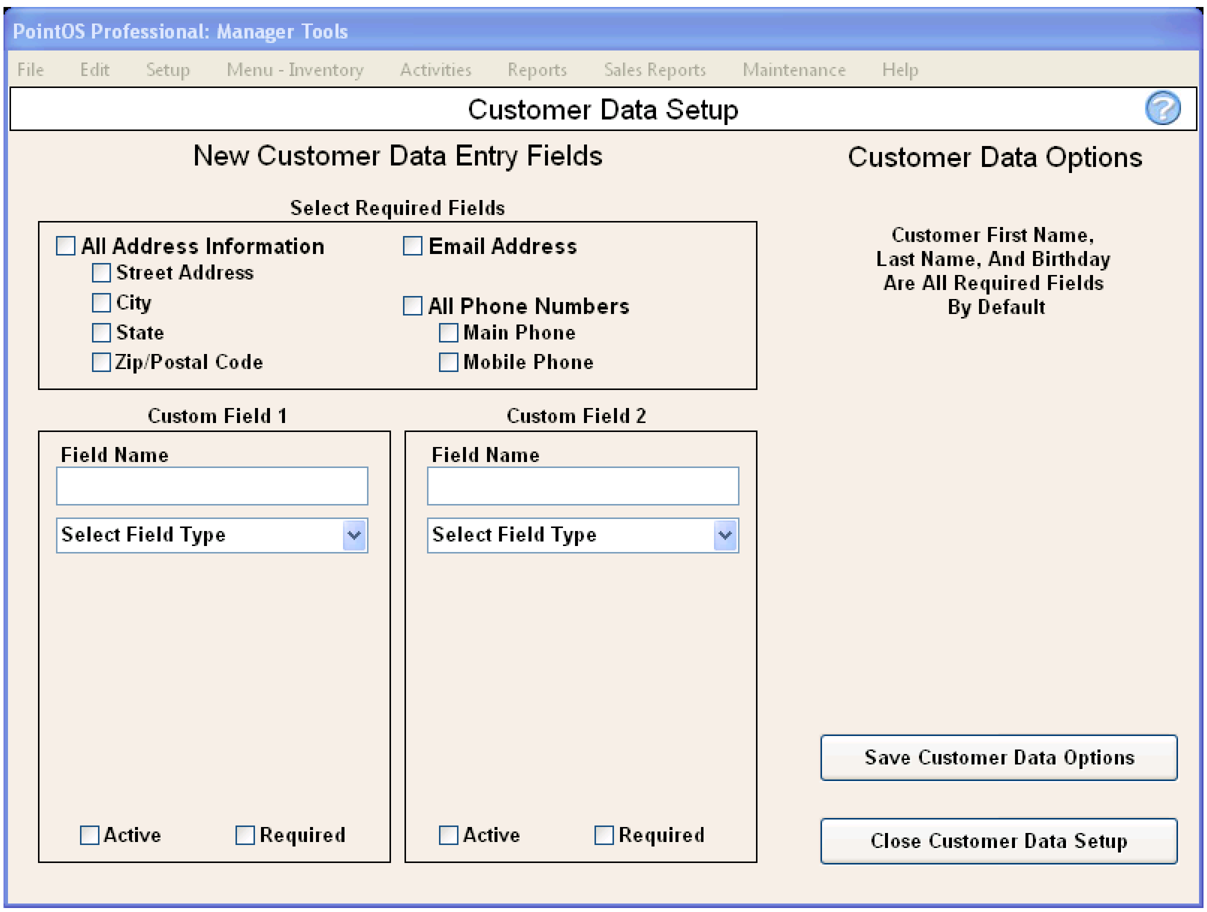


Figure 52: Customer Data Setup Screen

The Customer's first name, last name, and birthday are required fields when entering a new customer. To require additional information, check the box(es) next to the fields to require them.

To define a custom field, complete the following steps:

1. Enter the **Field Name**.
2. Choose an option form the **Select Field Type** drop down list.
3. If you select **Drop Down**, you must add the items for the list. Enter the name of the item in the field above the **Add** and **Remove** buttons and select **Add**. You can remove an item by highlighting it in the list and selecting **Remove**.

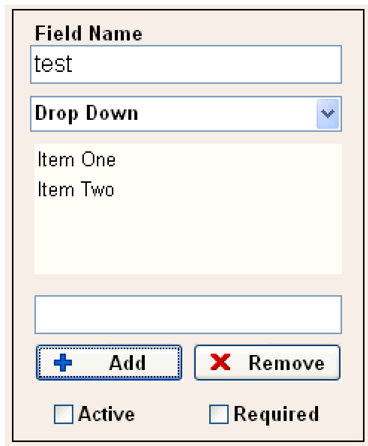


Figure 53: Sample Custom Field

4. Check the **Active** box to include the field on the **Customer Activities** screen.
5. Check the **Required** box to make the field required.
6. Select **Save Customer Data Options** to save the changes.
7. When you have finished defining the customer data, select **Close Customer Data Setup**.

Door Manager Settings

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Door Manager Settings* screen allows you to set your Door Manager settings.

To open the *Door Manager Settings* screen, select **Door Manager Settings** from the **Setup** menu.

The system displays the *Door Manager Settings* screen.

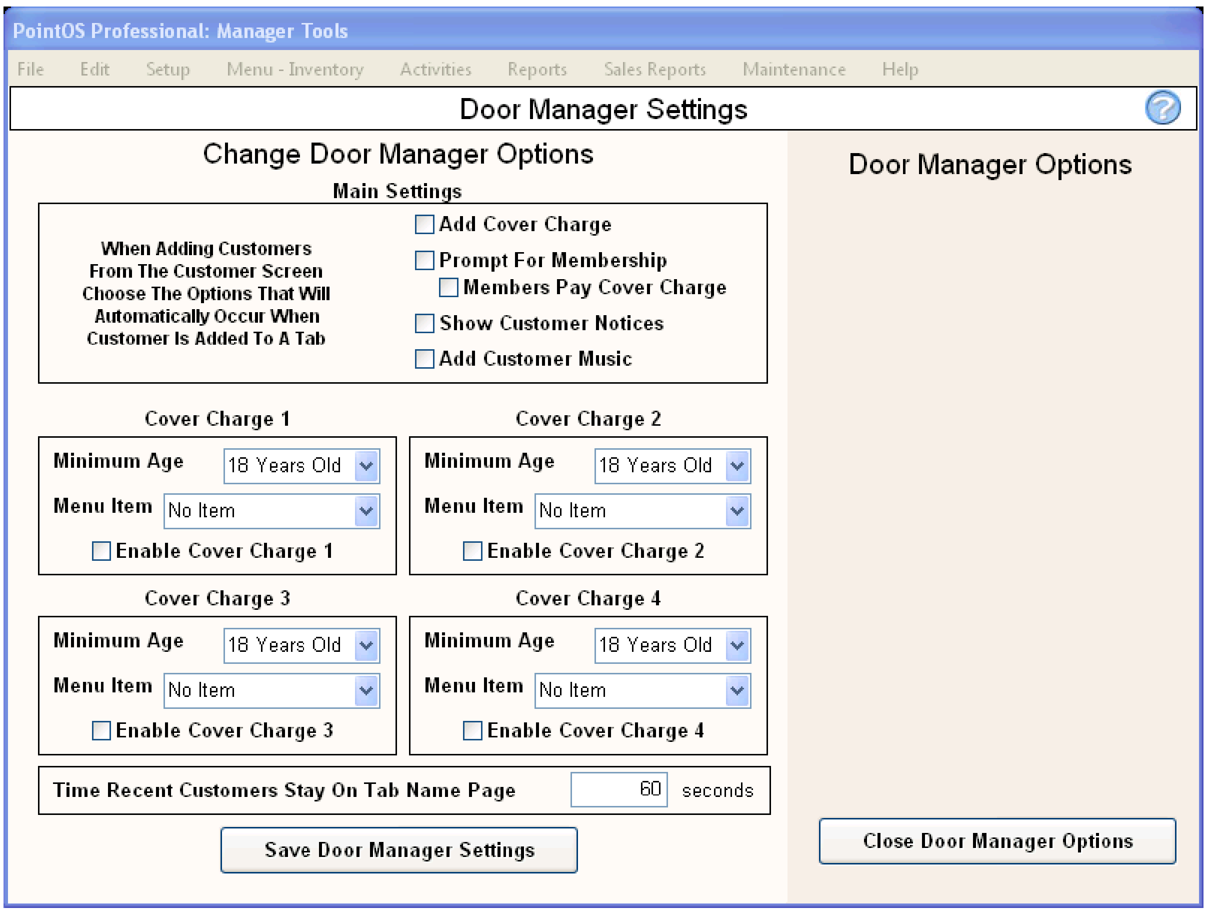


Figure 54: Door Manager Settings Screen

The **Main Settings** area controls what will automatically occur when you add a new customer to a tab using the Door Manager. Check one or more options to include those activities.

You can set up to four different cover charges. Complete the following steps for each cover charge:

1. Select the **Minimum Age** from the drop down list.
2. Select the associated **Menu Item** for the cover charge from the drop down list.
3. Check the **Enable Cover Charge** box.

4. Indicate how long recent customers stay on the *Door Manager Tab Name* page by entering the number of seconds in the field.
5. Select **Save Door Manager Settings** to save the information.
6. Select **Close Door Manager Options** when you have finished.

Door Security Setup

The *Door Security Setup* screen provides additional items for the *Security Settings* screen.

To open the *Door Security Settings* screen, select **Door Security Settings** from the **Setup** menu.

The system displays the *Door Security Settings* screen.

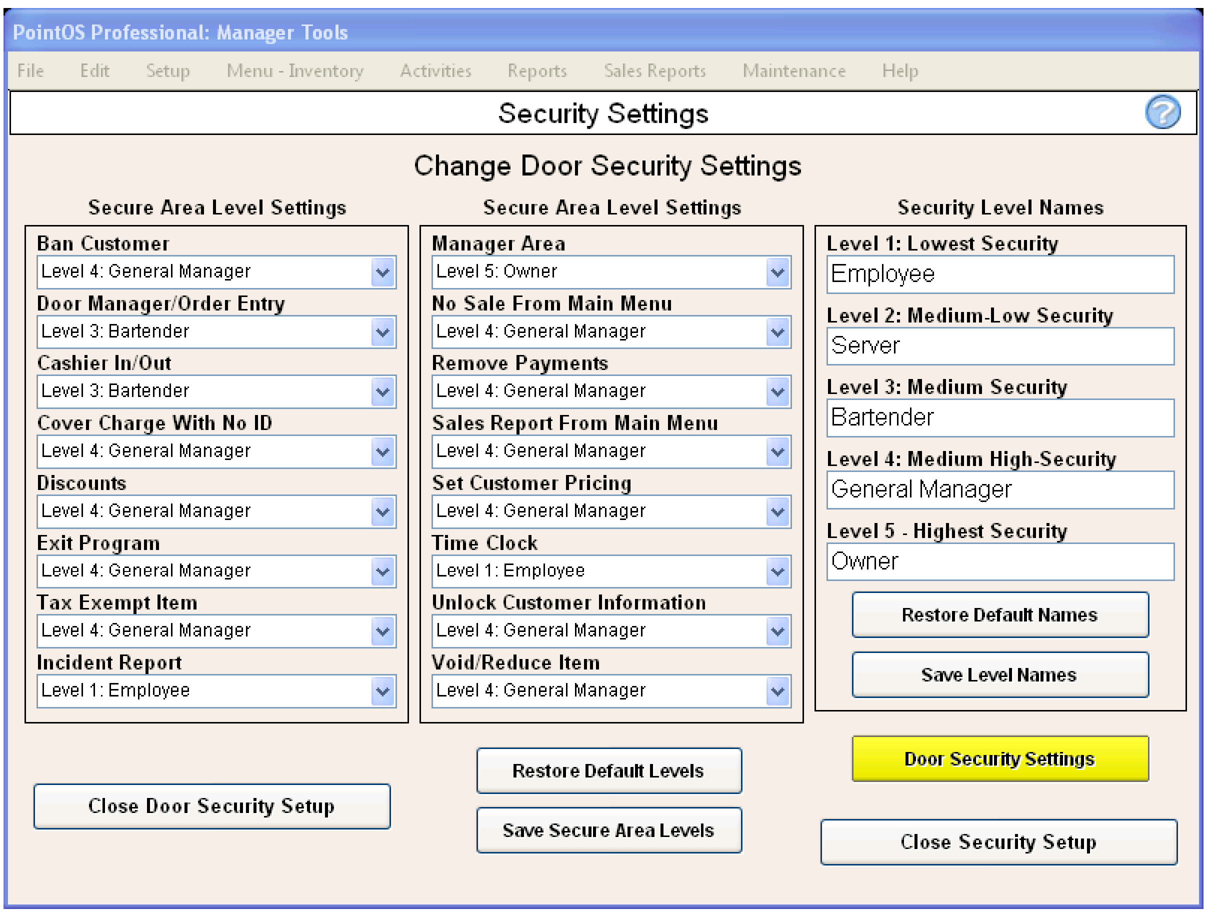


Figure 55: Door Security Settings

First, define the *Security Level Names* (right side of the screen). Complete the following steps:

1. Update each **Security Level Name** for the five levels of security available in PointOS.
2. If you have changed the security level names and want to restore the default names, select **Restore Default Names**.

3. When you have finished updating the names to reflect your establishment, select **Save Level Names**.

Next, you define a security setting for each type of activity in PointOS.

1. Select a **Secure Area Level Setting** from each activity's drop down list.
2. If you have changed security levels for activities, and want to restore the default security settings, select **Restore Default Levels**.
3. When you have finished updating the security levels to reflect your needs, select **Save Secure Area Levels**.

When you have finished defining security levels, select **Close Door Security Setup**.

Membership Setup

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Membership Setup* screen allows you to set up memberships.

To open the *Membership Setup* screen, select **Membership Setup** from the **Setup** menu.

The system displays the *Membership Setup* screen.

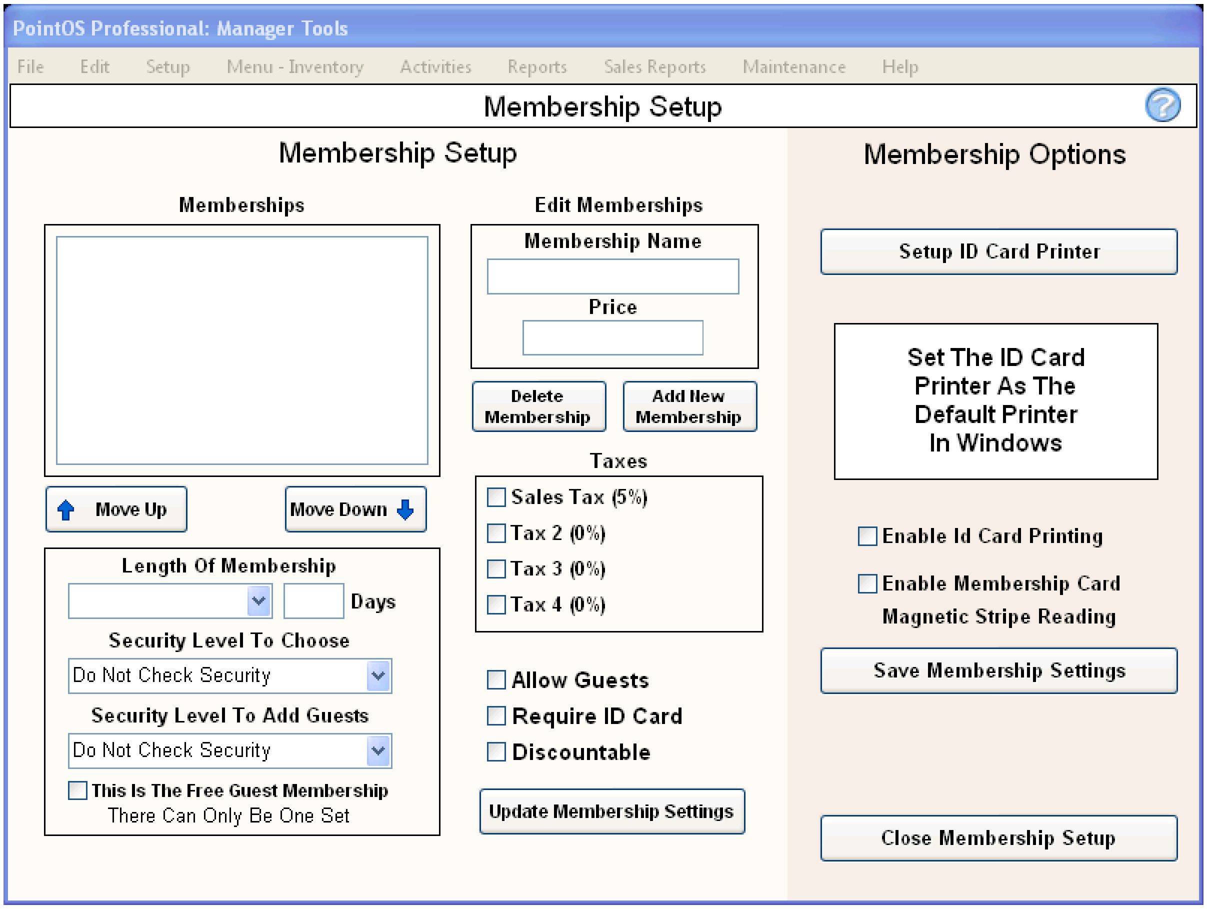


Figure 56: Membership Setup Screen

Memberships

The left side of the screen lists all of your memberships.

Define a New Membership

To define a new membership, complete the following steps:

1. Select **Add New Membership**.
2. Enter the **Membership Name**.
3. Enter the **Price** for the membership.
4. Select the **Length of Membership** from the drop down list.
5. Select a **Security Level to Choose** from the drop down list.
6. Select a **Security Level to Add Guests** from the drop down list.

7. For one membership, you can create a free guest membership. Check the **This is the Free Guest Membership** box if applicable.
8. Select the tax rate for the membership by checking one of the boxes under **Taxes**.
9. Check the **Allow Guests** box to indicate whether members may bring guests.
10. Check the **Require ID Card** to require the ID card.
11. Check the **Discountable** box to indicate the membership may be discounted.
12. Select **Save New Membership**.

The system displays a message notifying you that the membership has been added.

Change a Membership

To change a membership, complete the following steps:

1. Highlight the name of the membership you want to edit in the **Memberships** area.
2. Enter the **Membership** Name.
3. Enter the **Price** for the membership.
4. Select the **Length of Membership** from the drop down list.
5. Select a **Security Level to Choose** from the drop down list.
6. Select a **Security Level to Add Guests** from the drop down list.
7. For one membership, you can create a free guest membership. **Check the This is the Free Guest Membership** box if applicable.
8. Select the tax rate for the membership by checking one of the boxes under **Taxes**.
9. Check the **Allow Guests** box to indicate whether members may bring guests.
10. Check the **Require ID Card** to require the ID card.
11. Check the **Discountable** box to indicate the membership may be discounted.
12. Select **Update Membership Settings**.

Delete a Membership

To delete a membership, complete the following steps:

1. Highlight the name of the membership you want to delete in the **Memberships** area.
2. Select **Delete Membership**.

Membership Options

The **Membership Options** control the membership ID cards.

Check the **Enable ID Card Printing** box to enable ID card printing at this station.

NOTE: Make sure your ID card printer is the default printer in Windows for this computer.

Check the **Enable Membership Card Magnetic Stripe Reading** to enable your card reader.

To open the Membership ID Card Settings, select **Setup ID Card Printer**.

The system displays the *Membership ID Card Settings*.

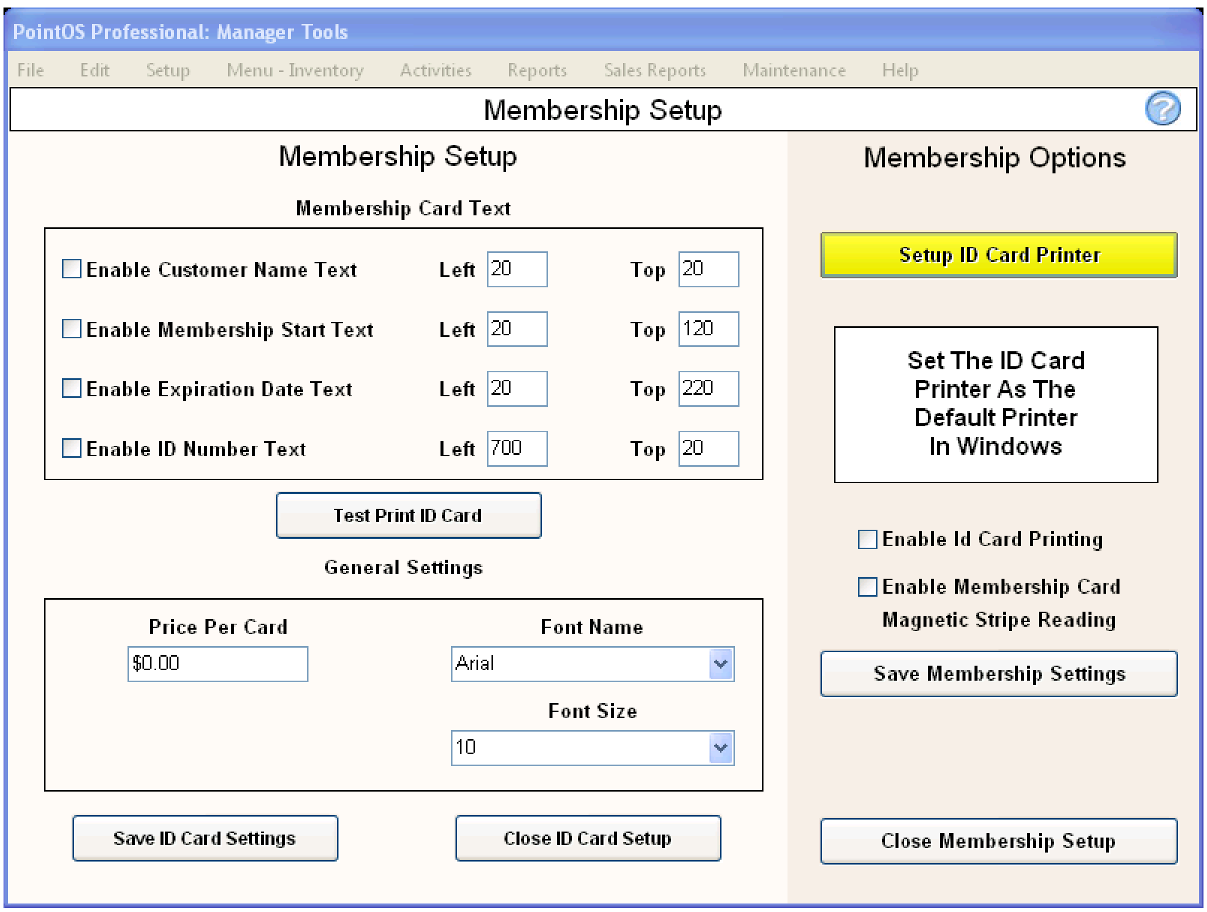


Figure 57: Membership ID Card Printing

To set up your membership card printing, complete the following steps:

1. To include the customer name on the membership card, check the **Enable Customer Name Text**. Enter the number of pixels from the **Left** and the **Top** of the card to print the customer name text.

2. To include the membership start date on the membership card, check the **Enable Membership Start Text**. Enter the number of pixels from the **Left** and the **Top** of the card to print the membership start date text.
3. To include the membership expiration date on the membership card, check the **Enable Expiration Date Text**. Enter the number of pixels from the **Left** and the **Top** of the card to print the expiration date text.
4. To include the ID Number on the membership card, check the **Enable ID Number Text**. Enter the number of pixels from the **Left** and the **Top** of the card to print the ID Number text.
5. Enter the price of the membership card, if applicable in the **Price Per Card** field.
6. Select the **Font Name** from the drop down list to indicate which font to use for printing the membership card.
7. Select the **Font Size** from the drop down list to indicate which size to use for printing the membership card.
8. Select **Save ID Card Settings** to save the settings.
9. To print a test membership card to test the settings, select **Test Print ID Card**.

When you have finished setting the membership card settings, select **Close ID Card Setup**.

Save Membership Settings

Select **Save Membership Settings** to save the settings for the selected membership.

When you have finished setting up your memberships, select **Close Membership Setup**.

Menu-Inventory Menu

Overview

The **Menu-Inventory** Menu includes options to allow you to take advantage of the powerful inventory control features of PointOS.

Your first step will be to create Inventory Items. These are the goods you purchase by the case, bottle, keg, or item. Refer to the "Inventory Item Setup" section in this Manager Manual for more information on setting up inventory items.

Once you have your inventory established, you can create your *Order Entry* menu by creating menu items. Menu items are the items that the server rings on the register for an order. Refer to the "Menu Setup" section in this Manager Manual for more information on setting up your menu items.

Inventory items can be menu items, but they can also be one ingredient in a recipe. Recipes are what link inventory items with menu items. For example, you may have one vodka menu item, but vodka may also be an ingredient in other menu items, like Long Island Ice Tea. Refer to the "Item Recipes" section in this Manager Manual for more information on creating recipes.

Once you have linked your inventory with menu items using recipes, the appropriate inventory count is automatically deducted when a menu item is sold. This information allows you to keep track of your inventory counts, as well as costs for menu items. You can even print order lists.

Menu Setup

The Menu Setup screen allows you to make your own *Order Entry* screen. You can set prices, modifiers, and other menu item settings. You also use this screen to navigate to the *Change Menu Item Options* screen.

To open the *Menu Setup* screen, select **Menu Setup** from the **Menu - Inventory** menu.

The system displays the *Menu Setup* screen.

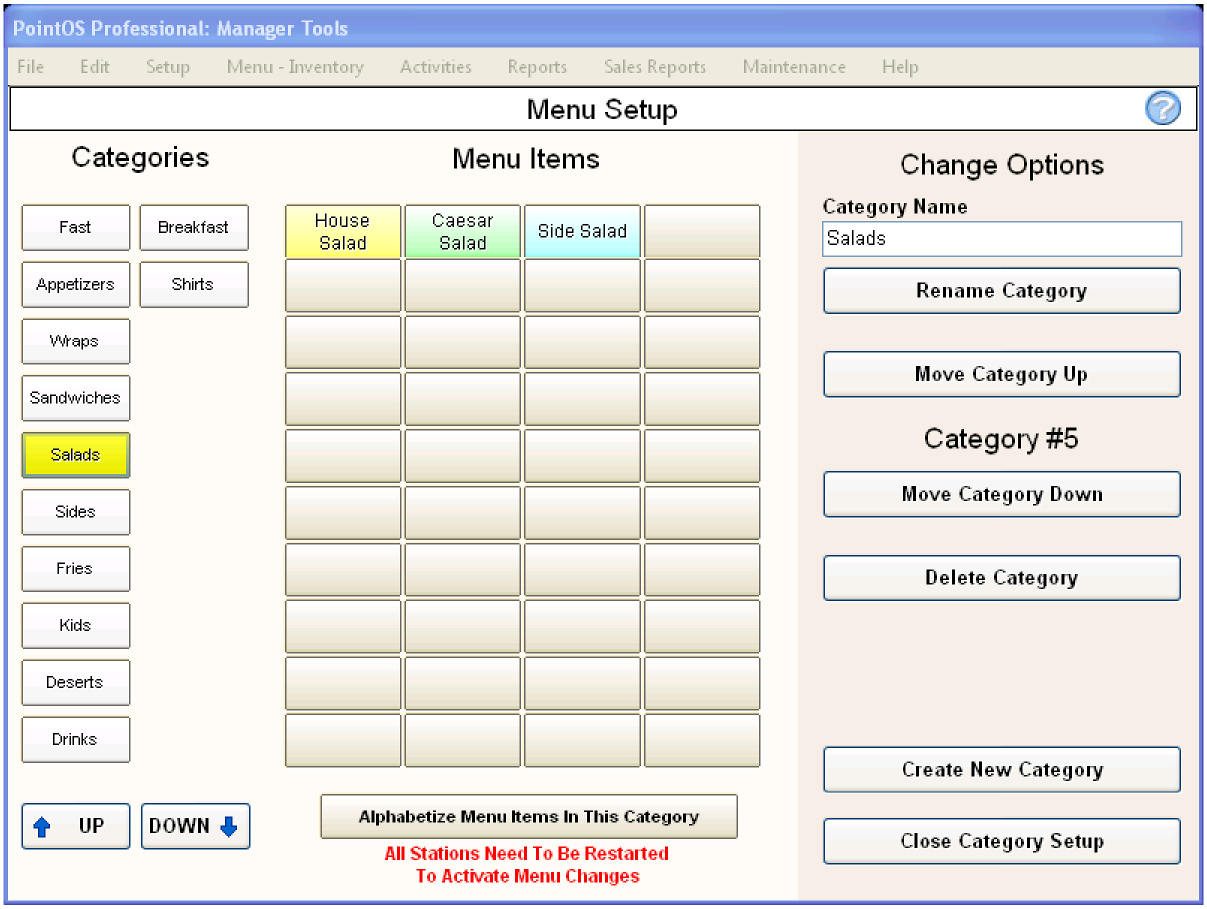


Figure 58: Menu Setup Screen

Categories

The left side of the screen lists all of your categories. You can use the **Up** and **Down** arrows to navigate through a long list of categories.

Define a New Category

To define a new category, complete the following steps:

1. Select **Create New Category** from the **Change Options** area.
2. The system displays the *Add New Category* dialog box. Enter the **Category Name**.
3. Select **OK**.

The system displays a message notifying you that the category has been added.

Change or Delete a Category

To change the categories, complete the following steps:

1. Highlight the name of the category you want to edit in the **Categories** area.
2. Edit the **Category Name**, if desired, and select **Rename Category**.
3. To reorganize the list of **Categories**, use the **Move Category Up** and **Move Category Down** selections until the highlighted category is in the desired position in the list.
4. To delete the category, select **Delete Category**.

Menu Items

When you highlight a category in the **Categories** area, the **Menu Items** associated with that category are shown in the **Menu Items** area.

You can add new menu items, create shortcuts to items in other categories, or hide menu items. Once a menu item has been created, it cannot be deleted.

Add a New Menu Item

To add a new menu item, complete the following steps:

1. From the **Categories** area, highlight the category in which you want the new menu item to appear.
2. Select a blank icon in the **Menu Items** area.

The system displays the *Add New Menu Item* dialog box.

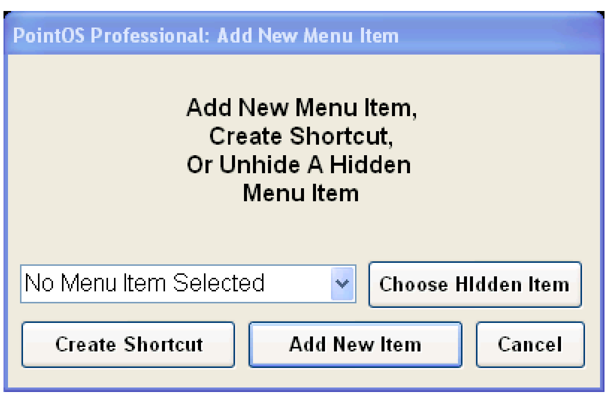


Figure 59: Add New Menu Item Dialog Box

3. Select **Add New Item**.

The system displays the *Change Menu Item Options* screen. Refer to the "Change Menu Item Options" section in this Manager Manual for more information on entering the information for the new menu item.

Create a Shortcut

Shortcuts are used when you want to include a menu item in more than one category. For example, you may have your most used items in a category called **Fast Items**. Each of those items can also appear in other categories using shortcuts.

To create a shortcut, complete the following steps:

1. From the **Categories** area, highlight the category in which you want the new shortcut to appear.
2. Select a blank icon in the **Menu Items** area.
3. The system displays the *Add New Menu Item* dialog box. Select **Create Shortcut**.

The system displays another dialog box.

Figure 60: Create Menu Shortcut

4. Select one of your menu items from the drop down list.
5. Select **Create Shortcut** to include the selected menu item in this category. Select **Cancel** to close the dialog box without creating a shortcut.

Delete a Shortcut

To delete a shortcut, complete the following steps:

1. From the **Categories** area, highlight the category in which you want to delete a shortcut.
2. Select the shortcut you want to delete.

The system displays a dialog box asking whether you want to remove the shortcut or edit the original item.

Figure 61: Delete Shortcut

3. Select **Remove Shortcut**. Or select **Cancel** to close the dialog box without removing the shortcut.

Show a Hidden Menu Item

Items may be hidden from the *Change Menu Item Options* screen. Refer to the "Change Menu Item Options" section in this Manager Manual for more information.

NOTE: You can use the **Hide Menu Item** option (on the *Change Menu Item Options* screen) to rearrange the order of the menu items. After you have hidden the item, select a blank button in **Menu Items** area where you would like to reposition the menu item.

To unhide the item (so you can change it, move it, or reinstate it to the *Order Entry* screen), complete the following steps:

1. From the **Categories** area, highlight the category in which you want the hidden item to appear.
2. Select a blank button in the **Menu Items** area.

The system displays the *Add New Menu Item* dialog box.

3. The drop down list includes any items in your system that are currently hidden. Select the desired item.
4. Select **Choose Hidden Item**.

Change Menu Item

To change a menu item, complete the following steps:

1. From the **Categories** area, highlight the category in which the item you want to change appears.
2. Select the menu item you want to change in the **Menu Items** area.

The system displays the *Change Menu Item Options* screen. Refer to the "Change Menu Item" section in this Manager Manual for more information on changing the information for the menu item.

If the item you selected is actually a shortcut, the system displays a dialog box asking whether you want to remove the shortcut or edit the original item. Select **Edit Original Item** to open the *Change Menu Item Options* screen for that item.

NOTE: You cannot delete a menu item, because if the item has previously been ordered, this will negatively affect reporting.

Change Menu Item Options Screen

The *Change Menu Item Options* screen allows you to add a new menu item, course separator, or gift card, or change existing menu items. You can also use this screen to move, hide, or delete menu items. This screen allows you to navigate to the *Modifier Setup* screen or the *Menu Item Recipe Setup* screen for a selected menu item.

Add New Menu Item or Edit Existing Menu Item

To enter a new menu item or change an existing menu item, complete the following steps:

1. Open a *Change Menu Item Options* screen for a new or existing menu item from the *Menu Setup* screen. Refer to the " a New Menu Item" section in this Manager Manual for the steps to open the *Change Menu Item Options* screen.

The system displays the *Change Menu Item Options* screen.

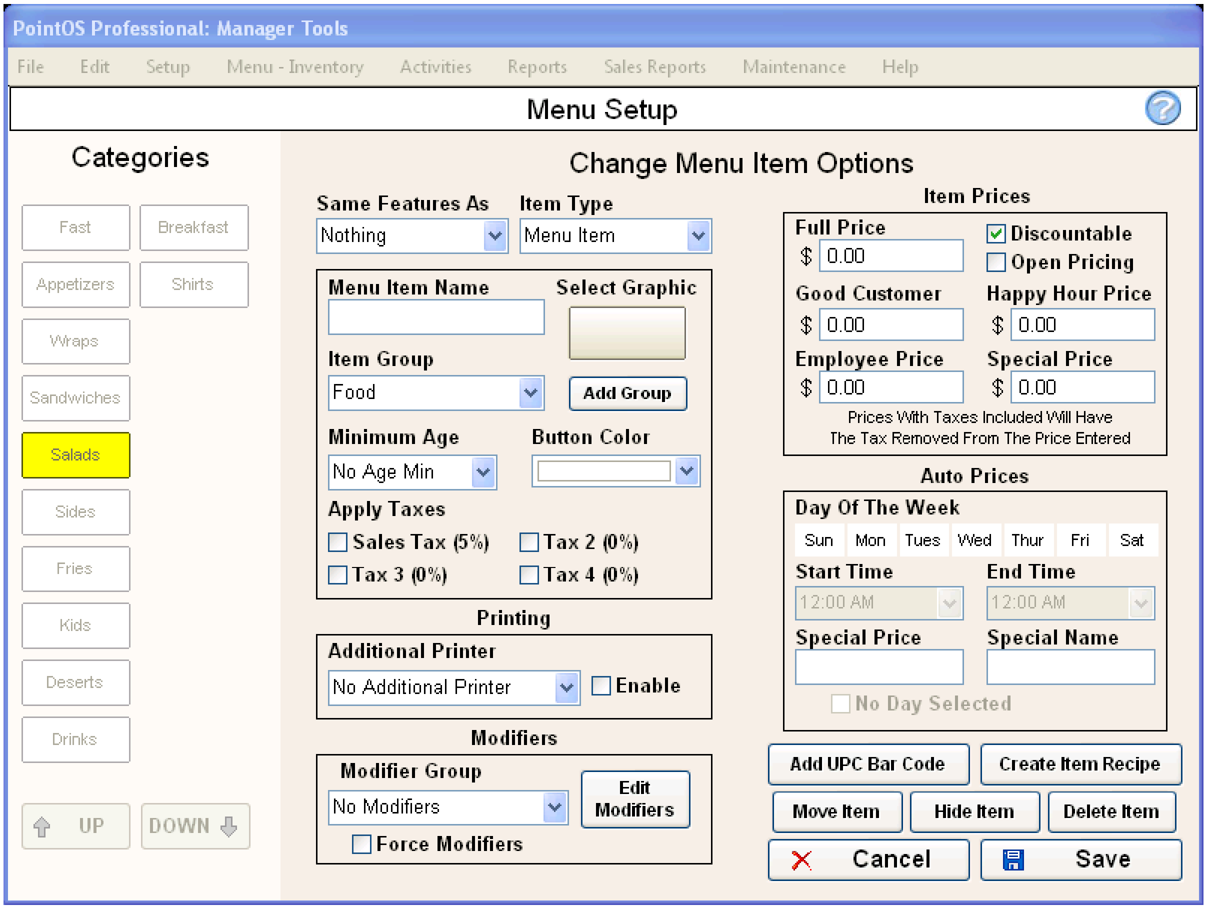


Figure 62: Change Menu Item Options for New Menu Item

2. To save data entry time, select an item from the **Same Features As** drop down list. Select an item similar to the one you are entering to automatically fill in many of the required fields.
3. To enter a regular menu item, leave the **Item Type** as **Menu Item**.
4. Enter the **Menu Item Name**.
5. To associate a **Graphic** with the menu item, complete the following steps:
   - Make sure the graphic you want is in the **Buttons** folder of the PointOS Database. Many graphics are available when you load PointOS. If you want to use a custom graphic, make sure it is a BMP format graphic sized at 33 x 70 pixels.
   - On the *Change Menu Item Options* screen, select **Graphic**.
   - The system displays an alert reminding you of the size and format requirements. Select **OK**.
   - The system opens a *Choose Button Graphic* dialog box open to the **Buttons** folder of the PointOS Database. Select the appropriate graphic and select **Open**.
   - The selected graphic is displayed in the **Select Graphic** area. It will also show on the *Menu Setup* screen for that item and the *Order Entry* screen for that item.

6. Select an **Item Group** from the drop down list. If you want to add a new group, select the **Add Group** button. The system displays the *Add New Group* dialog box. Enter the new **Group Name** and select **OK**. The system displays a dialog box indicating that the new group has been added. Select **OK**. The new group is now available from the **Item Group** drop down list.
7. If the menu item has age requirements, select the age from the **Minimum Age** drop down list. By choosing a minimum age, the item will only show up for customers who have met that age requirement.
8. To use a button color instead of or in addition to the graphic, select a color from the **Button Color** drop down list.
9. Check one or more of the appropriate boxes to **Apply Taxes**. These options control the sales tax collection for the item. Refer to the " Setup" section in this Manager Manual for more information on setting up sales tax.
10. The **Printing** area allows you to choose an additional printer. This is useful when a food item is printed to the kitchen or if you are using a service bar. To print the selected menu item to an additional printer, select the desired printer from the **Additional Printer** drop down list and check the **Print To This Additional Printer** box. Refer to the " Additional Printers" section in this Manager Manual for more information on setting up additional printers.
11. Select an item from the **Modifier Group** drop down list to include a defined Modifier with the menu item. The modifiers are setup on the *Modifier Setup* screen. Select **Edit Modifiers** to open the *Modifier Setup* screen. Refer to the " Setup" section in this Manager Manual for more information.
12. Check the **Force Modifiers** box to open the *Choose Item Modifiers* dialog each time the selected menu item is chosen during *Order Entry*. If you leave the box unchecked, modifiers are still available on the *Order Entry* screen, but the *Choose Item Modifiers* dialog box does not come up when the item is ordered.
13. Enter the **Item Prices**:
    - Enter the **Full Price**.
    - Enter the price for customers identified as your **Special Discount** defined on the *Discount Setup* screen. Refer to the " Setup" section in this Manager Manual for more information.
    - Enter the **Happy Hour** price.
    - Enter the price for **Employees**.
    - Enter the **Special Price** (to be used with Auto Pricing specials).
    - Check the **Discountable** box to indicate that the item can be discounted.
    - To have the server or wait staff set pricing, check the **Open Pricing** box. The price fields become the minimum price for that menu item and that type of pricing.
14. To use **Auto Pricing**:
    - First select the day of the week to use the automatic special pricing.
    - Select the time to start the automatic pricing special from the **Start Time** drop down list.
    - Select the time to end the automatic pricing special from the **End Time** drop down list.
    - Enter the **Special Price**.

· Enter the name of the special in the **Special Name** field.

· Repeat for other days and times, as desired.

NOTE: If many items are on special, we recommend that you use the *Happy Hour Setup* instead. Refer to the " Hour Setup" section in this Manager Manual for more information.

15. To add the UPC code from a product's packaging to the menu item, select **Add UPC Bar Code**. The system displays an *Add UPC Bar Code* dialog box. Scan the bar code to add it to the menu item. Using this option will allow you to scan an item to add it to a customer's order.
16. Select **Create Item Recipe** or **Edit Item Recipe** to open the *Menu Item Recipe Setup* screen. Refer to the " Recipes" section in this Manager Manual for more information.
17. Select **Save** to save the menu item or **Cancel** to close the *Change Menu Item Options* screen without saving the item.

After you save the item, the system returns to the *Menu Setup* screen.

Add or Edit Course Separator

Course Separators provide a separation between parts of a meal like appetizers, entrees, and desserts. These are only seen on the kitchen prints and do not appear on the customer's check. They do not have any prices attached.

To use course separators, you must add them as a menu item. Complete the following steps:

1. Open a *Change Menu Item Options* screen for a new or existing item from the *Menu Setup* screen. Refer to the " a New Menu Item" section in this Manager Manual for the steps to open the *Change Menu Item Options* screen.
2. Select **Course Separator** from the **Item Type** drop down list.

The *Change Menu Item Options* screen displays the options relevant to a course separator.

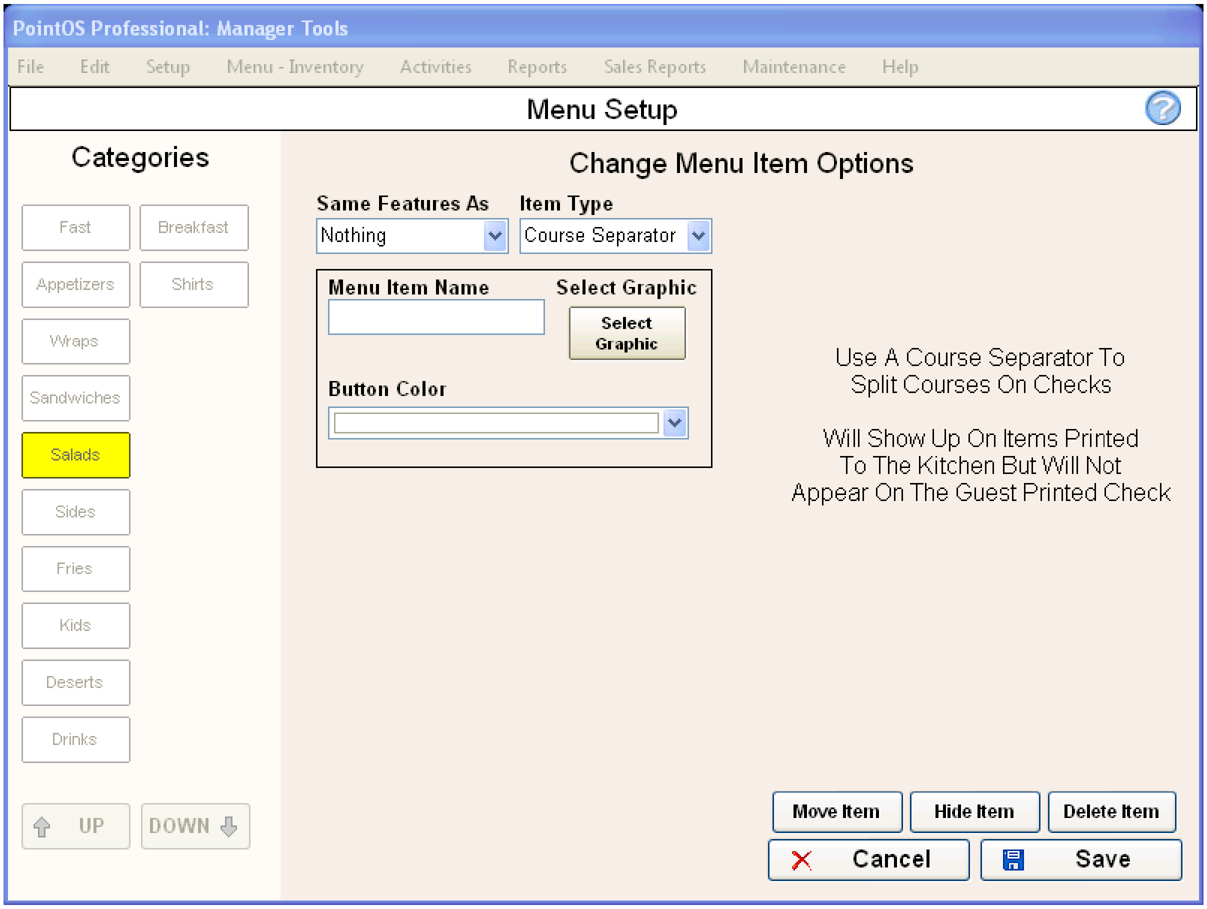


Figure 63: New Course Separator Menu Item

3. Enter the **Menu Item Name**.
4. To associate a graphic with the menu item, complete the following steps:
   - Make sure the graphic you want is in the **Buttons** folder of the PointOS Database. Many graphics are available when you load PointOS. If you want to use a custom graphic, make sure it is a BMP format graphic sized at 33 x 70 pixels.
   - On the *Change Menu Item Options* screen, select **Graphic**.
   - The system displays an alert reminding you of the size and format requirements. Select **OK**.
   - The system opens a *Choose Button Graphic* dialog box open to the Buttons folder of the PointOS Database. Select the appropriate graphic and select **Open**.
   - The selected graphic is displayed in the **Select Graphic** area. It will also show on the *Menu Setup* screen for that item and the *Order Entry* screen for that item.
5. To use a button color instead of or in addition to the graphic, select a color from the **Button Color** drop down list.

6. Select **Save** to save the menu item or **Cancel** to close the *Change Menu Item Options* screen without saving the course separator. After you save the item, the system returns to the *Menu Setup* screen.

Add or Edit Gift Card Menu Item

A Merchant Warehouse account is required for using gift cards. You must acquire the gift cards through Merchant Warehouse.

To sell gift cards, you must also add them as a menu item. Complete the following steps:

1. Open a *Change Menu Item Options* screen from the *Menu Setup* screen. Refer to the " a New Menu Item" section in this Manager Manual for the steps to open the *Change Menu Item Options* screen.
2. Select **Gift Card** from the **Item Type** drop down list.

The *Change Menu Item Options* screen displays the options relevant to a gift card.

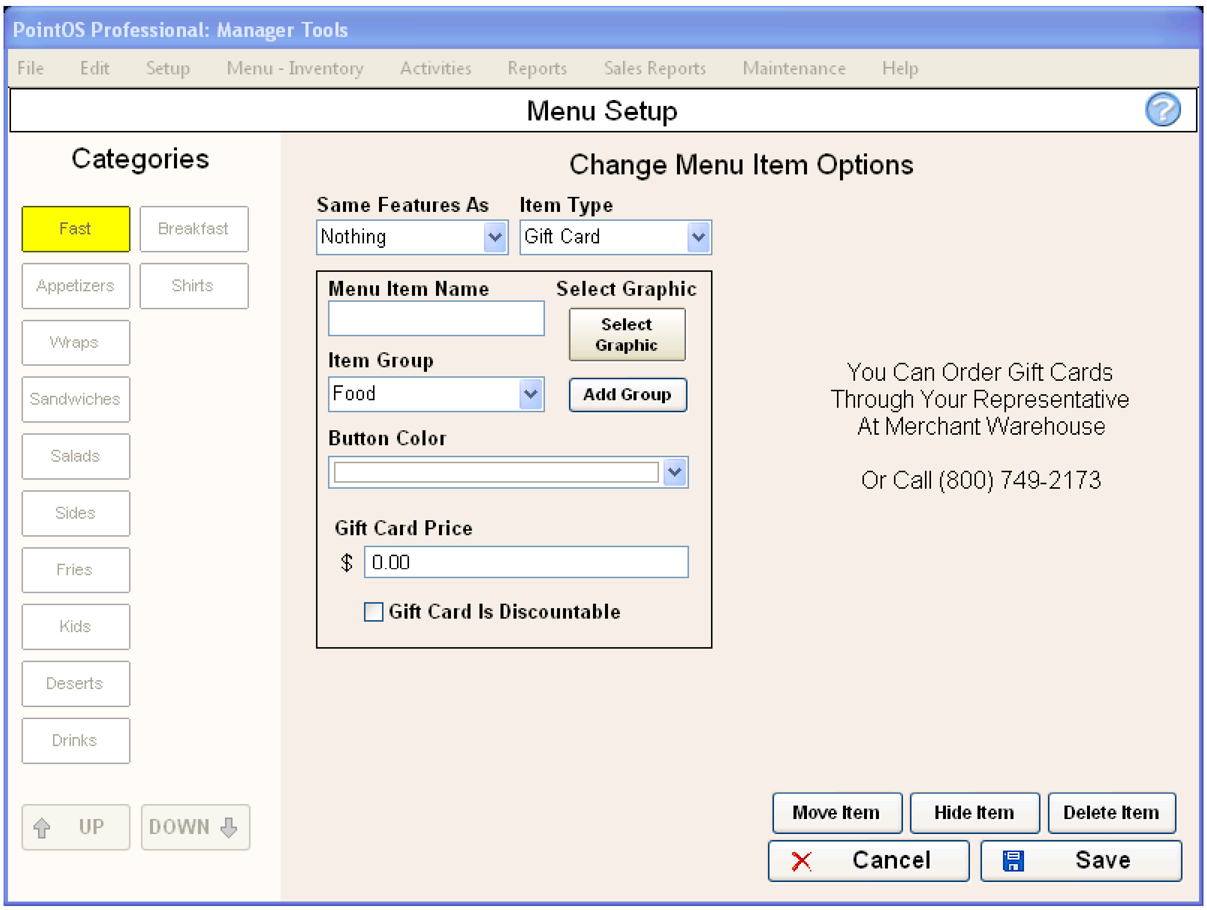


Figure 64: New Gift Card Menu Item

3. Enter the **Menu Item Name**.
4. To associate a **Graphic** with the menu item, complete the following steps:

- Make sure the graphic you want is in the **Buttons** folder of the PointOS Database. Many graphics are available when you load PointOS. If you want to use a custom graphic, make sure it is a BMP format graphic sized at 33 x 70 pixels.
- On the *Change Menu Item Options* screen, select **Graphic**.
- The system displays an alert reminding you of the size and format requirements. Select **OK**.
- The system opens a *Choose Button Graphic* dialog box open to the Buttons folder of the PointOS Database. Select the appropriate graphic and select **Open**.
- The selected graphic is displayed in the **Select Graphic** area. It will also show on the *Menu Setup* screen for that item and the *Order Entry* screen for that item.

5. To use a button color instead of or in addition to the graphic, select a color from the **Button Color** drop down list.
6. Enter the **Gift Card Price** of the selected gift card.
7. Select **Save** to save the menu item or **Cancel** to close the *Change Menu Item Options* screen without saving the item. After you save the item, the system returns to the Menu Setup screen.

Move Item

To move an existing menu item, complete the following steps:

1. Open a *Change Menu Item Options* screen for the menu item you want to move from the *Menu Setup* screen.
2. Select **Move Item**.

The system displays the *Move Menu Item* screen.

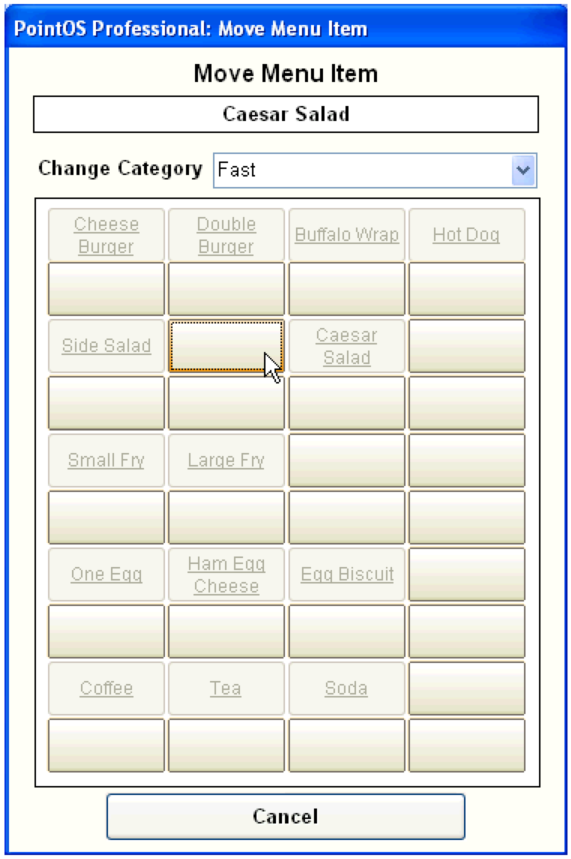


Figure 65: Move Menu Item Screen

3. Select the **Category** from the **Change Category** drop down list. Remember that you may have a menu item appear in more than one category.
4. Select an open button on the menu.
5. The system displays a dialog box asking if you want to move the item. Select **Yes** to continue. Select **No** to close the dialog box without moving the item.
6. The system displays a message indicating that the item has been moved. Select **OK** to close the message.

Hide Item

To hide an existing menu item, complete the following steps:

1. Open a *Change Menu Item Options* screen for the menu item you want to hide from the *Menu Setup* screen.
2. Select **Hide Item**.
3. The system displays a warning message to confirm that you want to hide the menu item. All Shortcuts to that menu item are also deleted. Select **Yes** to confirm that you want to hide the item.

Delete Item

Deleting an item removes all of the shortcuts.

To delete an existing menu item, complete the following steps:

1. Open a *Change Menu Item Options* screen for the menu item you want to delete from the *Menu Setup* screen.
2. Select **Delete Item**.
3. The system displays a warning message to confirm that you want to delete the menu item. All Shortcuts to that menu item are deleted. Select **Yes** to confirm that you want to delete the item.
4. The system displays a message indicating that the item has been moved. Select **OK** to close the message.

Menu Item Edit

The *Menu Item Edit* screen allows you to see the full price and Happy Hour price for all of the menu items in a selected category at one time. You can also use this screen to quickly add a new item or edit the name or prices for an existing item.

To open the *Menu Item Edit* screen, select **Menu Item Edit** from the **Menu-Inventory** menu.

The system displays the *Menu-Item Edit* screen.

To view the menu items for a category, select the **Category** from the drop down list.

The system populates the screen with the menu items in that category.

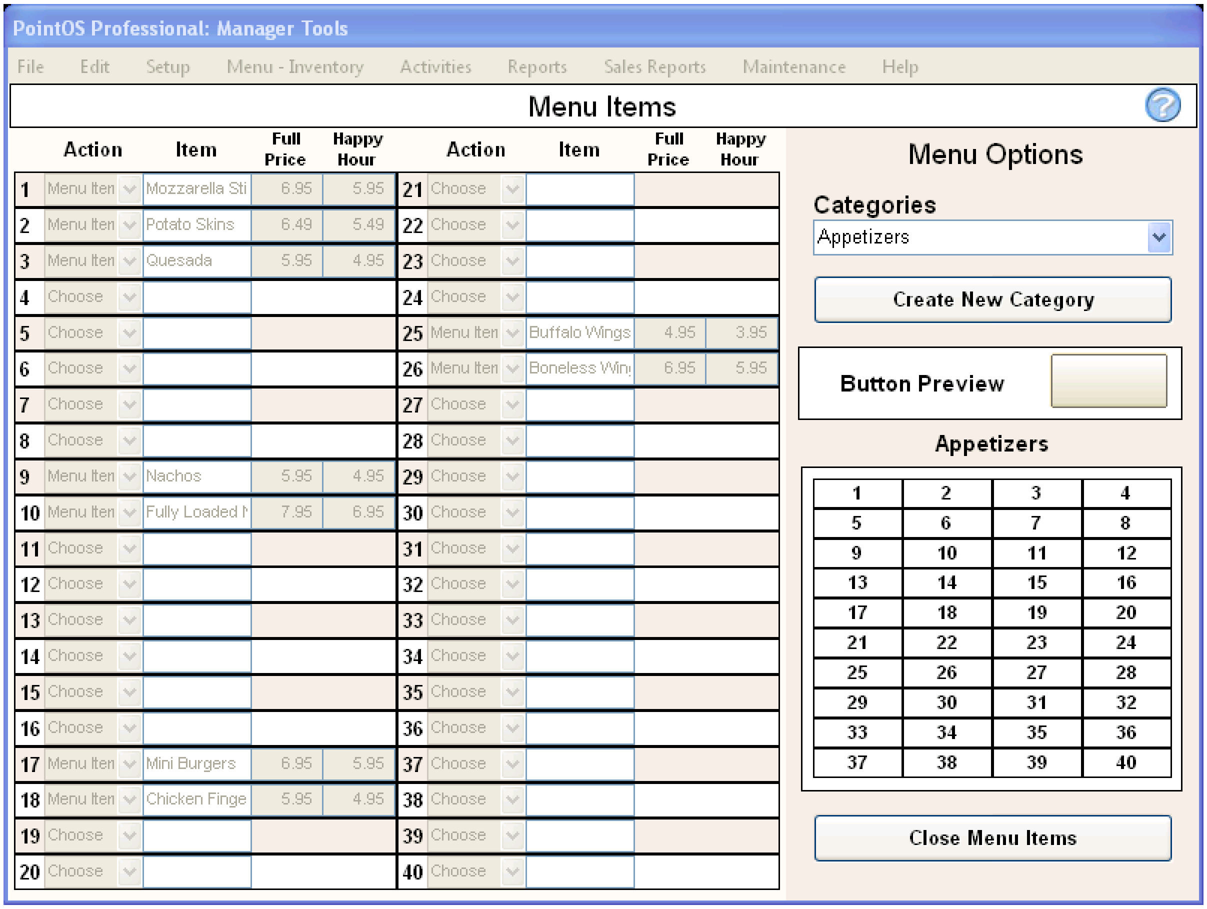


Figure 66: Menu Item Edit Screen

Edit Menu Item Name or Prices

To edit a menu item in the selected category, complete the following steps:

1. Select the number of the item you want to edit from the grid on the right side of the screen.
2. Edit the **Item Name**.
3. Edit the **Full Price**.
4. Edit the **Happy Hour Price**.
5. Select **Save**.

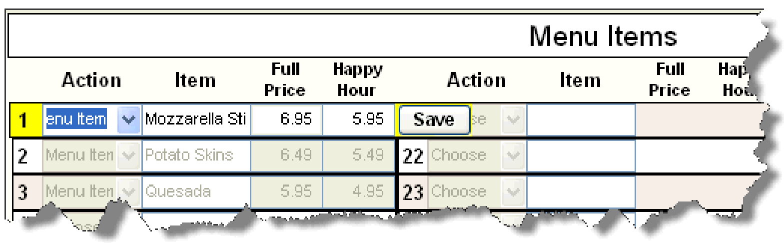


Figure 67: Edit Menu Item Example

Move Menu Item

To move a menu item in the selected category, complete the following steps:

1. Select the number of the item you want to edit from the grid on the right side of the screen.
2. Select **Move Item** from the **Action** drop down list.

The system displays the *Move Menu Item* screen.

3. Select the **Category** from the **Change Category** drop down list. Remember that you may have a menu item appear in more than one category.
4. Select an open button on the menu.
5. The system displays a dialog box asking if you want to move the item. Select **Yes** to continue. Select **No** to close the dialog box without moving the item.
6. The system displays a message indicating that the item has been moved. Select **OK** to close the message.

Hide Menu Item

To hide a menu item in the selected category, complete the following steps:

1. Select the number of the item you want to edit from the grid on the right side of the screen.
2. Select **Hide Item** from the **Action** drop down list.
3. Select **Save**.
4. The system displays a warning message to confirm that you want to hide the menu item. All Shortcuts to that menu item are also deleted. Select **Yes** to confirm that you want to hide the item.

Door Menu Setup

The *Door Menu Setup* screen allows you to set up menu items that are shown on the Door Manager *Order Entry* screen.

To open the *Door Menu Setup* screen, select **Door Menu Setup** from the **Menu - Inventory** menu.

The system displays the *Door Menu Setup* screen.

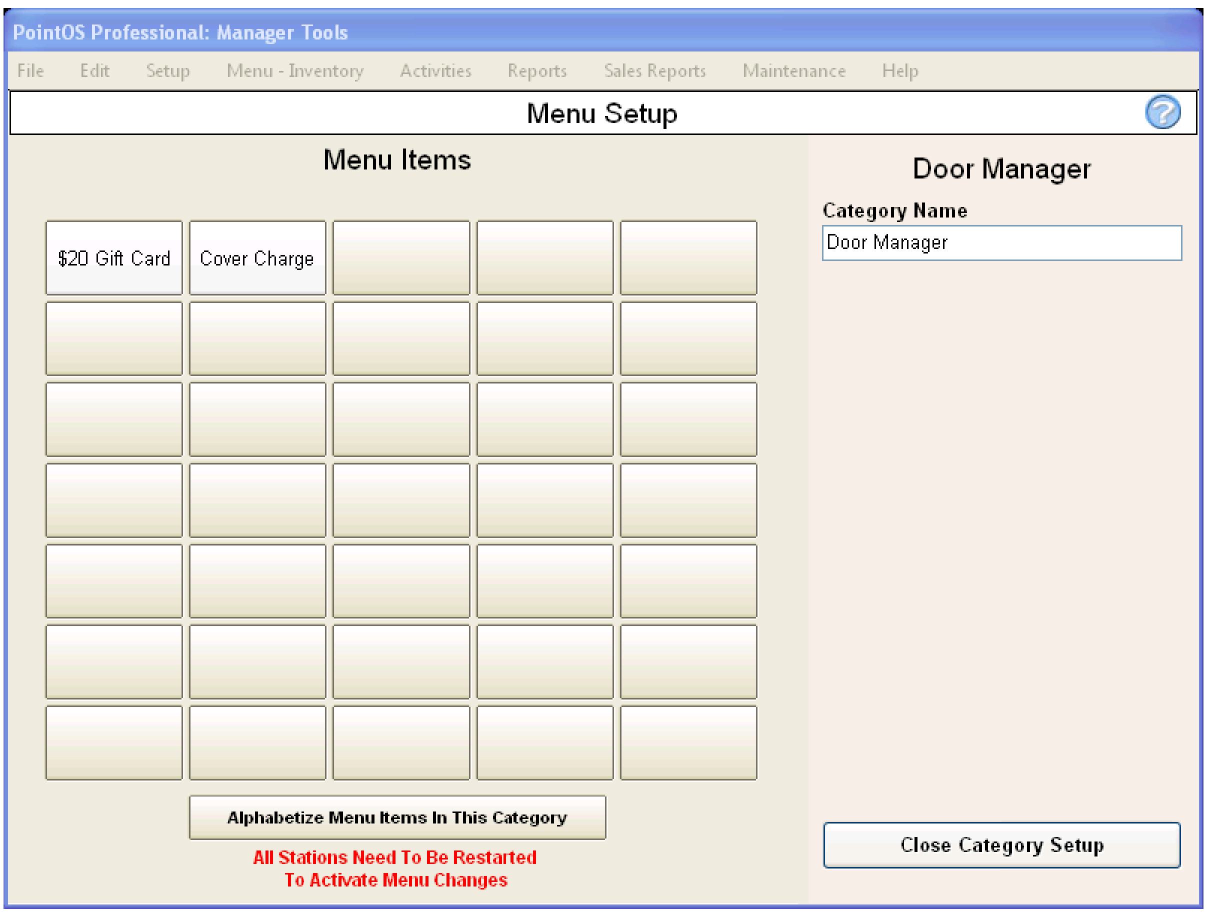


Figure 68: Door Menu Setup Screen

To change the Category Name, enter a new name in the **Category Name** field.

To alphabetize menu items in the display, select the **Alphabetize Menu Items in This Category** button. The system displays a message asking if you want to alphabetize the items. Select **Yes** to continue. Or select **No** to close the dialog box without changing the order of the menu items.

Select a menu item to open the *Change Menu Item Options* screen to edit that item. Refer to the "Change Menu Item Options" section in this Manager Manual for more information.

Select a blank item to open the *Change Menu Item Options* screen to create a new item for the Door Manager menu. Refer to the "Change Menu Item Options" section in this Manager Manual for more information.

Select the **Close Category Setup** button to close the screen.

Modifier Setup

Modifier groups are a collection of modifiers that can be applied to a single menu item or multiple menu items. Modifiers are used to make changes to a menu item during ordering and are printed on the customer's receipt. Modifiers can have an additional cost associated with them, a discount associated with them (or negative price), or no price, which would be used for the service or kitchen staff to prepare the item. Modifiers can also change inventory depletion amounts for items on your menu.

To open the *Menu Modifier Setup* screen, select **Modifier Setup** from the **Menu-Inventory** menu.

The system displays the Menu *Modifier Setup* screen.

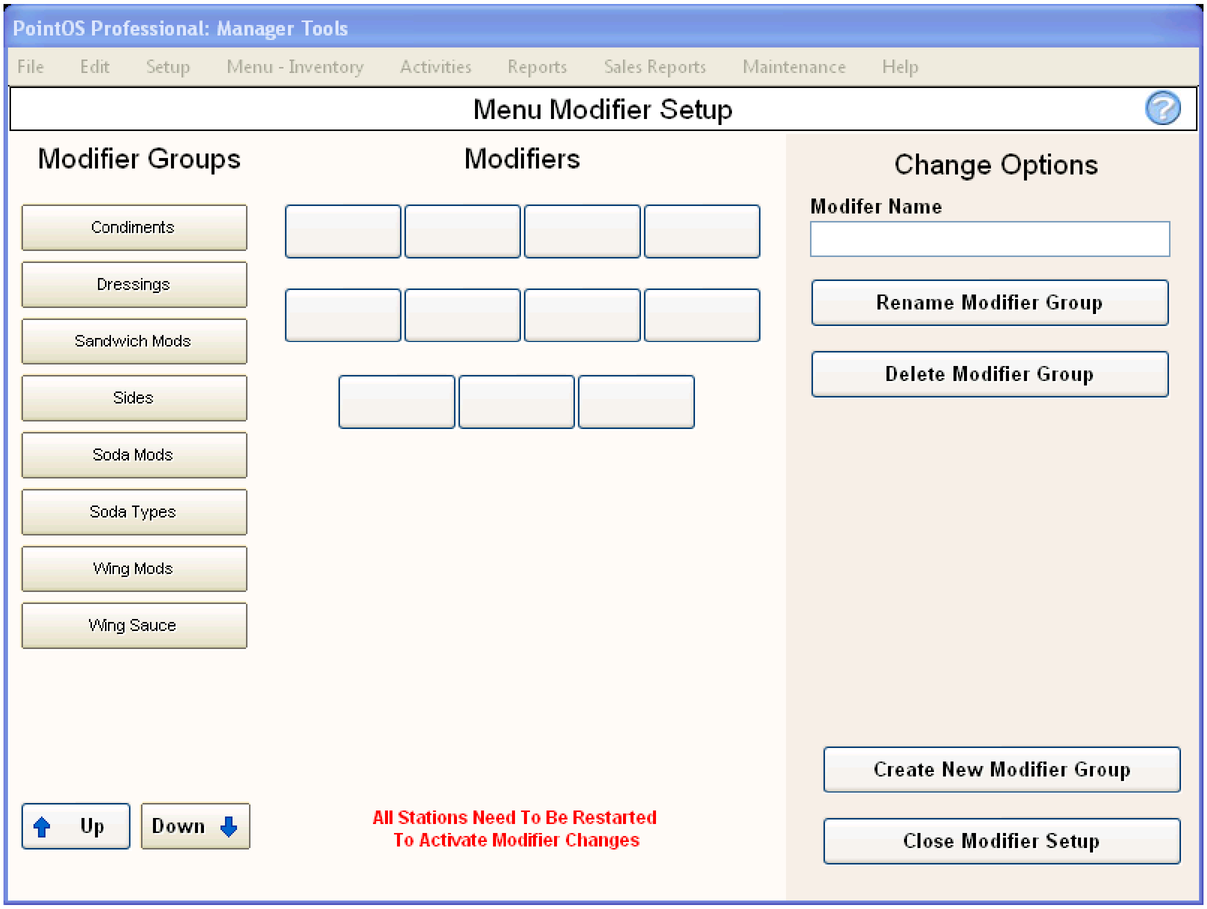


Figure 69: Menu Modifier Setup Screen

Modifier Groups

The left side of the screen lists all of your modifier groups. You can use the **Up** and **Down** arrows to navigate through a long list of groups.

Define a New Modifier Group

To define a new modifier group, complete the following steps:

1. Select **Create New Modifier Group** from the **Change Options** area.

The system displays the *Add New Modifier Group* dialog box.

2. Enter the **Modifier Group Name**. A modifier group can be named anything, but this name must be unique. The customer does not see these names.
3. Select **OK**.

4. The system displays a message notifying you that the modifier group has been added. Select **OK** to close the message.

Change or Delete a Modifier Group

To change the modifier groups, complete the following steps:

1. Highlight the name of the modifier group you want to edit in the **Modifier Groups** area.
2. Edit the **Modifier Name**, if desired, and select **Rename Modifier Group**.
3. To delete the modifier group, select **Delete Modifier Group**.

Modifiers

When you highlight a modifier group in the **Modifier Groups** area of the *Menu Modifier Setup* screen, the Modifiers associated with that group are shown in the **Modifiers** area.

You can add, change, or delete modifiers. Each group can have a maximum of 11 modifiers.

NOTE: A Custom Modifier is automatically included in all modifier groups. The Customer Modi-fier will allow the server to enter instructions in the *Order Entry* screen.

Change Modifier Options Screen

To add a modifier to the selected group, or to change an existing modifier, complete the following steps:

1. From the **Modifier Groups** area, highlight the group in which you want the new modifier to appear.
2. To add a new modifier, select a blank icon in the **Modifiers** area. To change or delete an existing modifier, select the icon for that modifier.

The system displays the *Change Modifier Options* screen.

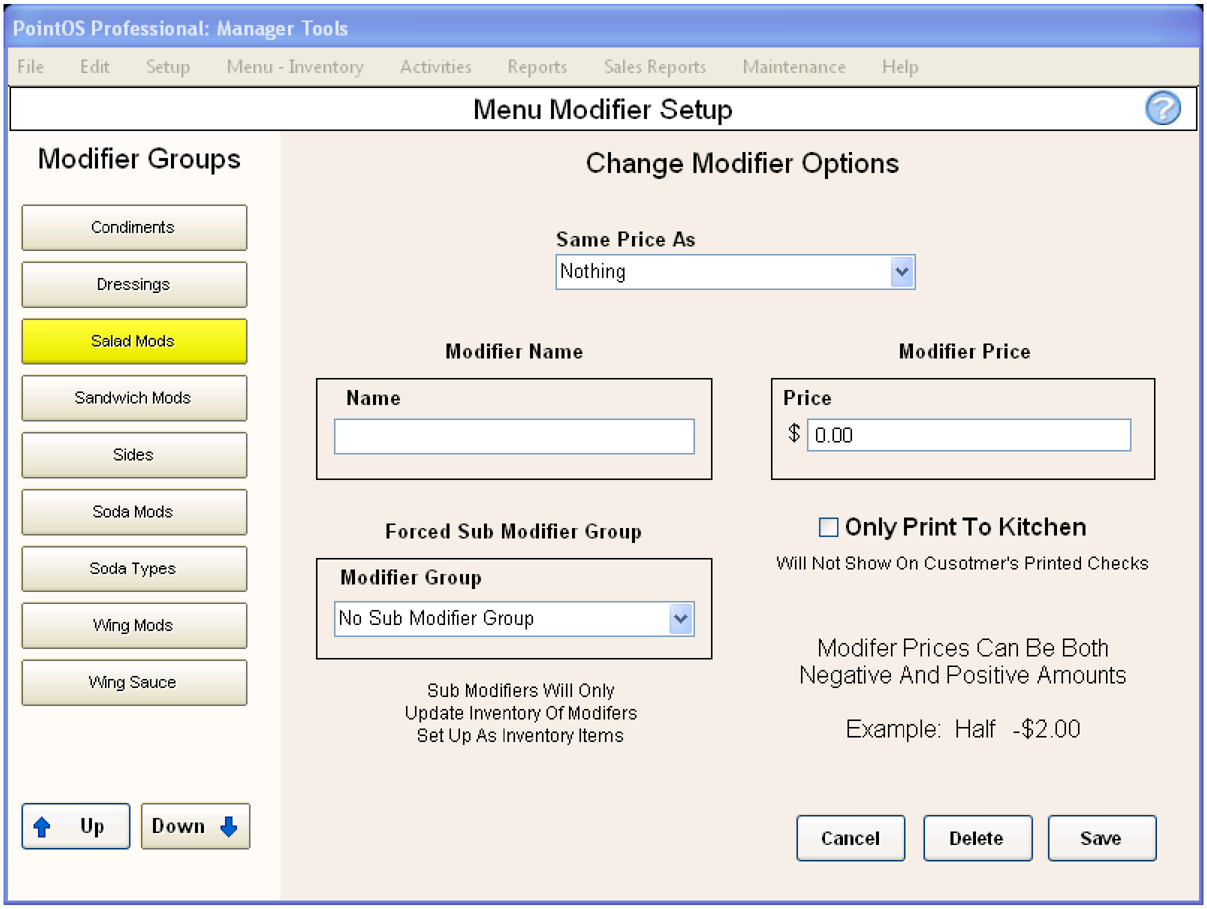


Figure 70: Change Modifier Options Screen

3. If the modifier has the same pricing as another item, select the item from the **Same Price As** drop down list to automatically fill the price field.
4. Enter or update the **Modifier Name**. Use something descriptive. Modifiers are shown in alphabetical order. Modifier names are seen by servers and customers.
5. Enter or update the **Modifier Price**. You can use a negative number to have the modifier reduce a menu item price.
6. Select an item from the **Forced Sub Modifier Group** drop down list to update inventory of modifiers set up as inventory items. Modifiers can only have one sub modifier. For example, you could create a modifier-sub modifier group to get Condiments – Ketchup and Condiments – Mustard, but you CANNOT create the levels for Toppings – Cheese – American, and Toppings – Cheese – Swiss.
7. Check the **Only Print to Kitchen** box to keep the modifier from printing on the customer’s check.
8. To delete the modifier, select **Delete**.
9. Select **Save** to save the changes and return to the previous screen or **Cancel** to close the screen without saving changes.

Inventory Item Setup

The *Inventory Item Setup* screen allows you to set up your inventory control. You also use this screen to navigate to the *Change Inventory Item* screen.

To open the *Inventory Item Setup* screen, select **Inventory Item Setup** from the **Menu-Inventory** menu.

The system displays the *Inventory Item Setup* screen.

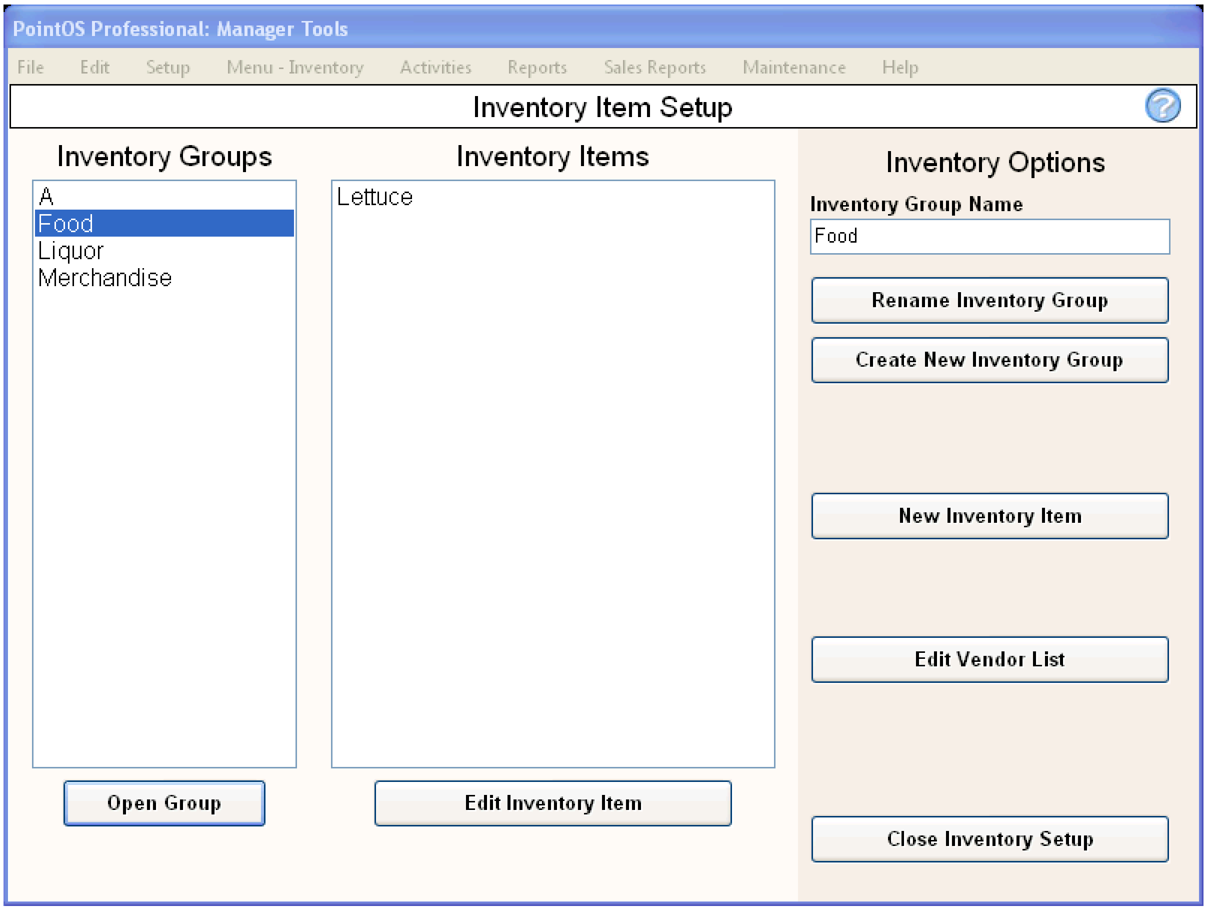


Figure 71: Inventory Item Setup Screen

Inventory Groups

The left side of the screen lists all of your inventory groups. Inventory Groups are used to keep inventory items together. Inventory items must be part of an inventory group.

Define a New Inventory Group

To define a new category, complete the following steps:

1. Enter the **Inventory Group Name**.
2. Select **Create New Inventory Group** from the **Inventory Options** area.
3. The system displays a message notifying you that the inventory group has been added. Select **OK** to close the message.

NOTE: You can also define Inventory Groups on the fly as you create new inventory items. Refer to the " Inventory Item" section in this Manager Manual for more information.

Change or Delete an Inventory Group

To change or delete an inventory group, complete the following steps:

1. Highlight the name of the inventory group you want to edit in the **Inventory Groups** area.
2. Select **Open Group**.
3. Edit the **Inventory Group Name**, if desired.
4. To rename the group, select **Rename Inventory Group**. To delete the category, select **Delete Category**.

Inventory Items

When you highlight an inventory group in the **Inventory Groups** area, the **Inventory Items** associated with that group are shown in the Inventory Items area.

To add a new Inventory Item, select **New Inventory Item**.

To change an existing Inventory Item, highlight it in the **Inventory Items** area and select **Edit Inventory Item**.

Whether you are adding a new Inventory Item, or changing an existing item, the system opens the *Change Inventory Item* screen. Refer to the "Change Inventory Item" section in this Manager Manual for more information.

Vendor List

Inventory Items must also have vendors associated with them. Select **Edit Vendor List** to open the *Vendor Setup* screen. Refer to the "Vendor Setup" section in this Manager Manual for more information about the Vendor List.

Close Inventory Setup

When you have finished setting up your inventory, select **Close Inventory Setup**.

Change Inventory Item

The *Change Inventory Item* screen allows you to enter the item information and specifics of each inventory item. It also allows you to link your inventory item to menu items with single item recipes. If you set Par Amounts, the system can make recommendations on how much of an item you should purchase.

To open the *Change Inventory Item* screen, go to the *Inventory Item Setup* screen. Select **New Inventory Item**, or highlight the inventory item you want to change and select **Edit Inventory Item**.

The system displays the *Change Inventory Item* screen.

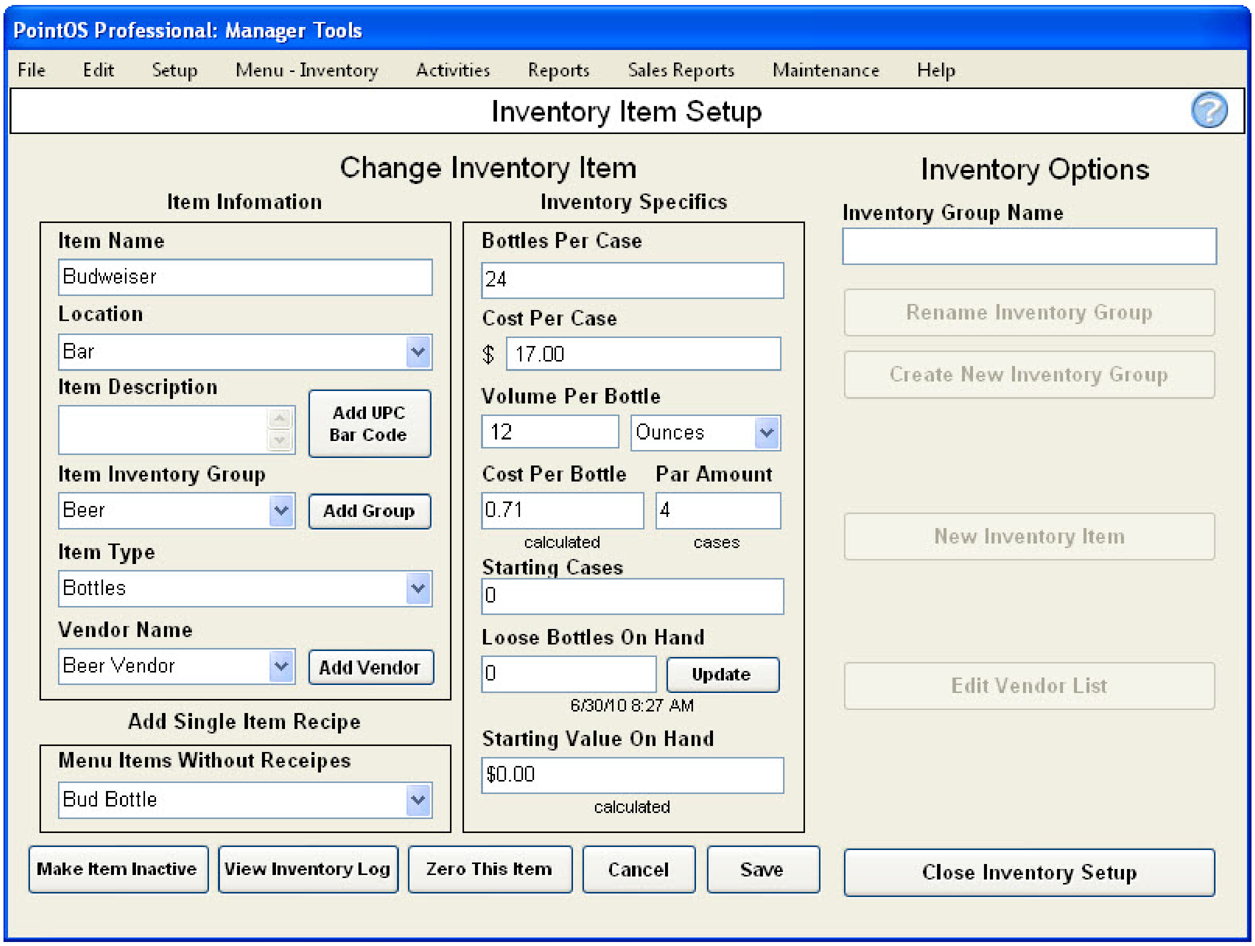


Figure 72: Change Inventory Item Screen

To create a new inventory item or edit an existing item, complete the following steps:

1. Enter or edit the **Item Name**.
2. Select an option from the **Location** drop down list to indicate where the item is stored.

3. To add the UPC code from a product's packaging to the inventory item, select **Add UPC Bar Code**. The system displays an *Add UPC Bar Code* dialog box. Scan the bar code to add it to the inventory item. The **Item Description** area displays the description associated with the UPC Bar Code.

NOTE: A UPC Bar Code is required to use this feature.

4. Select the appropriate **Item Inventory Group** from the drop down list. If you would like to add a new group, select **Add Group**. The system displays a dialog box. Enter the name for the new **Inventory Group** and select **OK**.
5. Select an option from the **Item Type** drop down list. You can select bottles, cans, liquor, keg beer, wine, food by case, food by item, or merchandise. The type of item influences the other inventory specifics you will enter in a moment.
6. Select an option from the **Vendor** drop down list. If you would like to add a new group, select **Add Vendor**. The system opens the *Vendor Setup* screen. Refer to the " Setup" section in this Manager Manual for more information.
7. Inventory items should be associated with at least one menu item. This is done using recipes. To add a single item recipe association, select the appropriate menu item from the **Item Name** drop down list. Refer to the " Recipes" section in this Manager Manual for more information on creating recipes to link your inventory with menu items.
8. Select **Make Item Inactive** to remove the item from your current inventory lists.
9. Select **Zero Inventory Item** to set the current inventory for this item to zero.
10. Select **Inventory Item Log** to view the *Inventory Log* screen for this item. Refer to the Item Log" section in this Manager Manual for more information.

11. Enter or update the **Inventory Specifics** according to the following chart:

If the Item Type is…	Then complete the following Inventory Specifics…
Bottles, Cans, Food by Case	· Enter the number of bottles, cans, or servings in the **Bottles/Cans/ Servings per Case** field. · Enter the appropriate cost in the **Cost Per Case** field. · Enter the **Volume per Bottle/Can**. (Not applicable for Food by Case) · Select the **Volume Measurement** type from the drop down list. (Not applicable for Food by Case) · The system calculates and displays the **Cost Per Bottle/Can/Serving** based on the bottles/cans/servings per case and the cost per case amounts. · Enter the amount you want to always have on hand in the **Par Amount** field. · Enter the amount you have now in the **Starting (Full) Cases** field, if desired. · Enter the number of **Loose Bottles/Cans/Servings on Hand**, if desired. · Select **Update** to update the calculations with any new data. · The system displays the calculated **Starting Value On Hand**.
Liquor, Keg, Wine	· Enter the **Cost Per Bottle/Keg**. · Enter the **Volume Per Bottle/Keg**. · Select the **Volume Measurement** type from the drop down list. · The system calculates and displays the **Cost Per Ounce** based on the bottle/keg volume and cost. · Enter the amount you want to always have on hand in the **Par Amount** field. · Enter the number of full **Bottles/Kegs on Hand**, if desired. · For partial bottles/kegs on hand, select an amount from the **Starting Part Bottle/Keg** drop down list. · Select **Update** to update the calculations with any new data. · The system displays the calculated **Starting Value On Hand**.
Food by Item, Merchandise	· Enter the number of **Items on Hand**, if desired. · Select **Update** to update the calculations with any new data. · Enter the **Cost per Item**. · Enter the amount you want to always have on hand in the **Par Amount** field. · The system displays the calculated **Value On Hand**.

12. Select **Save** to save your changes or **Cancel** to close the *Change Inventory Item Setup* screen without saving your changes.

Inventory Item Log

The *Inventory Item Log* screen displays your starting inventory, any manager changes, the inventory depletion, and the current inventory for a selected inventory item.

To open the *Inventory Item Log* screen, go to the *Change Inventory Item* screen for the selected inventory item and select the **View Inventory Item** button.

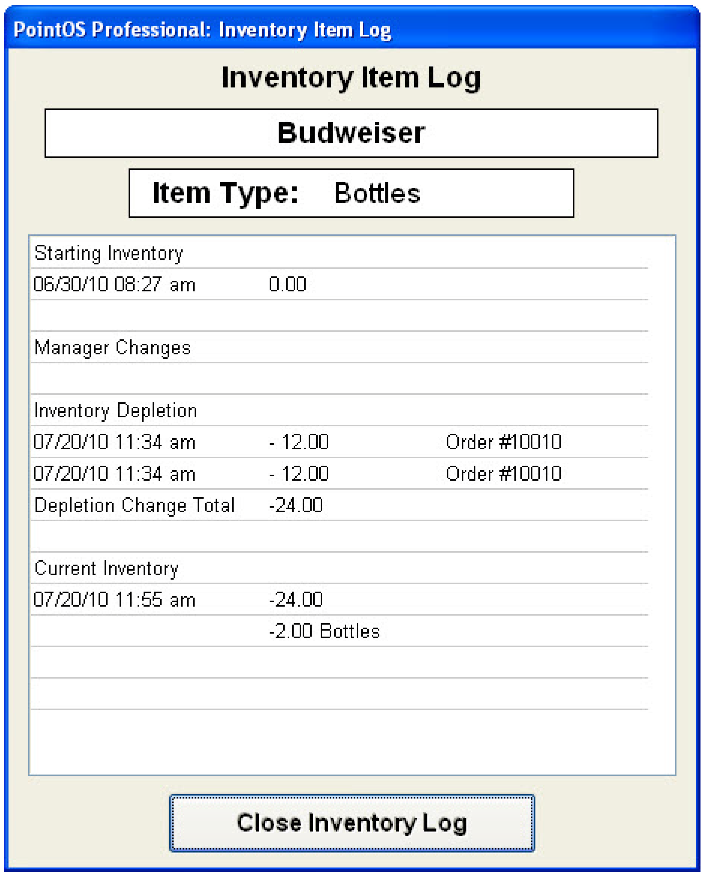


Figure 73: Inventory Item Log Screen

Vendor Setup

The *Vendor Setup* screen allows you to set up your vendors. You can keep track of the people you buy from and use this information to print order sheets by vendor.

To open the *Vendor Setup* screen, select **Vendor Setup** from the **Menu - Inventory** menu.

The system displays the *Vendor Setup* screen.

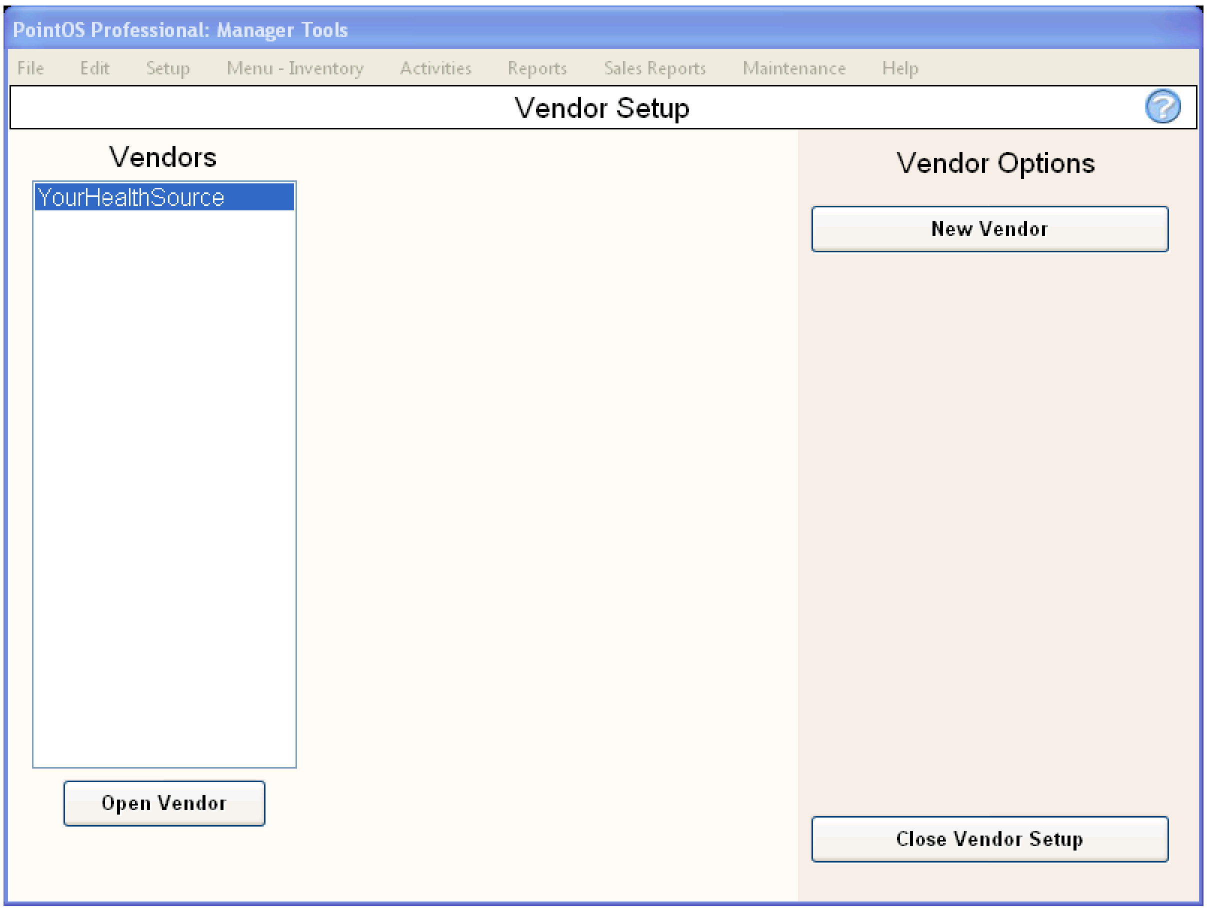


Figure 74: Vendor Setup Screen

The left side of the screen lists all of your vendors.

To define a new vendor, **Select New Vendor**. The system opens a blank *Vendor Information* screen.

To change vendor information, complete the following steps:

1. Highlight the name of the vendor you want to edit in the **Vendors** area.
2. Select **Open Vendor**.

The system opens the *Vendor Information* screen for that vendor.

When you have finished setting up your vendors, select **Close Vendor Setup**.

Vendor Information Screen

To enter a new vendor or update existing vendor information, you use the *Vendor Information* screen.

To open the *Vendor Information* screen, go to the *Vendor Setup* screen and select **New Vendor** or select the vendor from the **Vendor** list and select **Open Vendor**.

The system displays the *Vendor Information* screen.

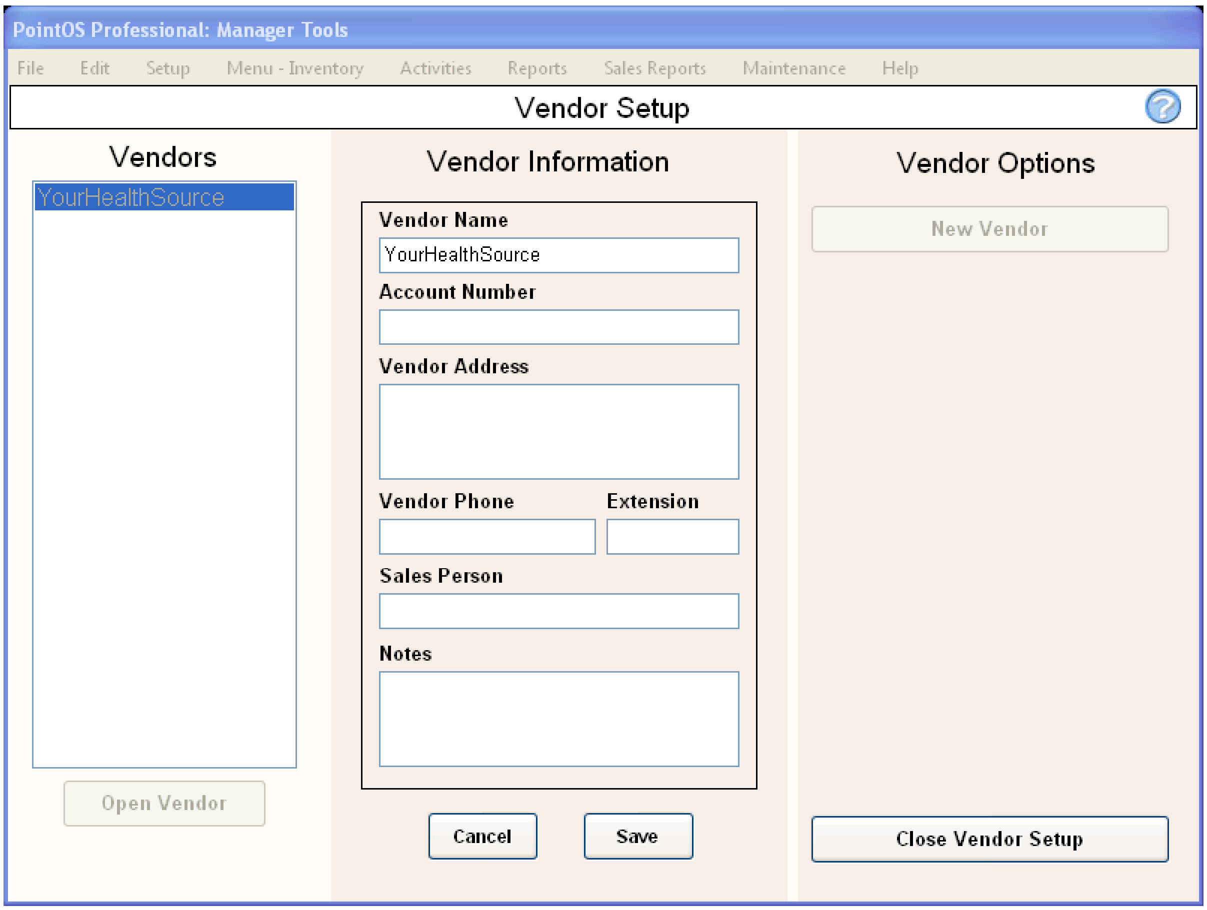


Figure 75: Vendor Information Screen

To enter a new vendor or edit an existing vendor, complete the following steps:

1. Enter the **Vendor Name**. This field is required.
2. Enter your **Account Number** with the vendor, if desired.
3. Enter the **Vendor Address**.
4. Enter the **Vendor Phone Number** and **Extension**.
5. Enter the name of the **Sales Person**.

6. Enter any **Notes** about the vendor.
7. Select **Save** to save the vendor reference information or select **Cancel** to close the *Vendor Information* without saving.

Item Recipes

The *Menu Item Recipe Setup* screen allows you to set up the ingredients that go into a menu item. The system then deducts these ingredients from inventory when you sell that menu item.

To open the *Menu Item Recipe Setup* screen, select **Item Recipes** from the **Menu - Inventory** menu.

The system displays the *Menu Item Recipe Setup* screen.

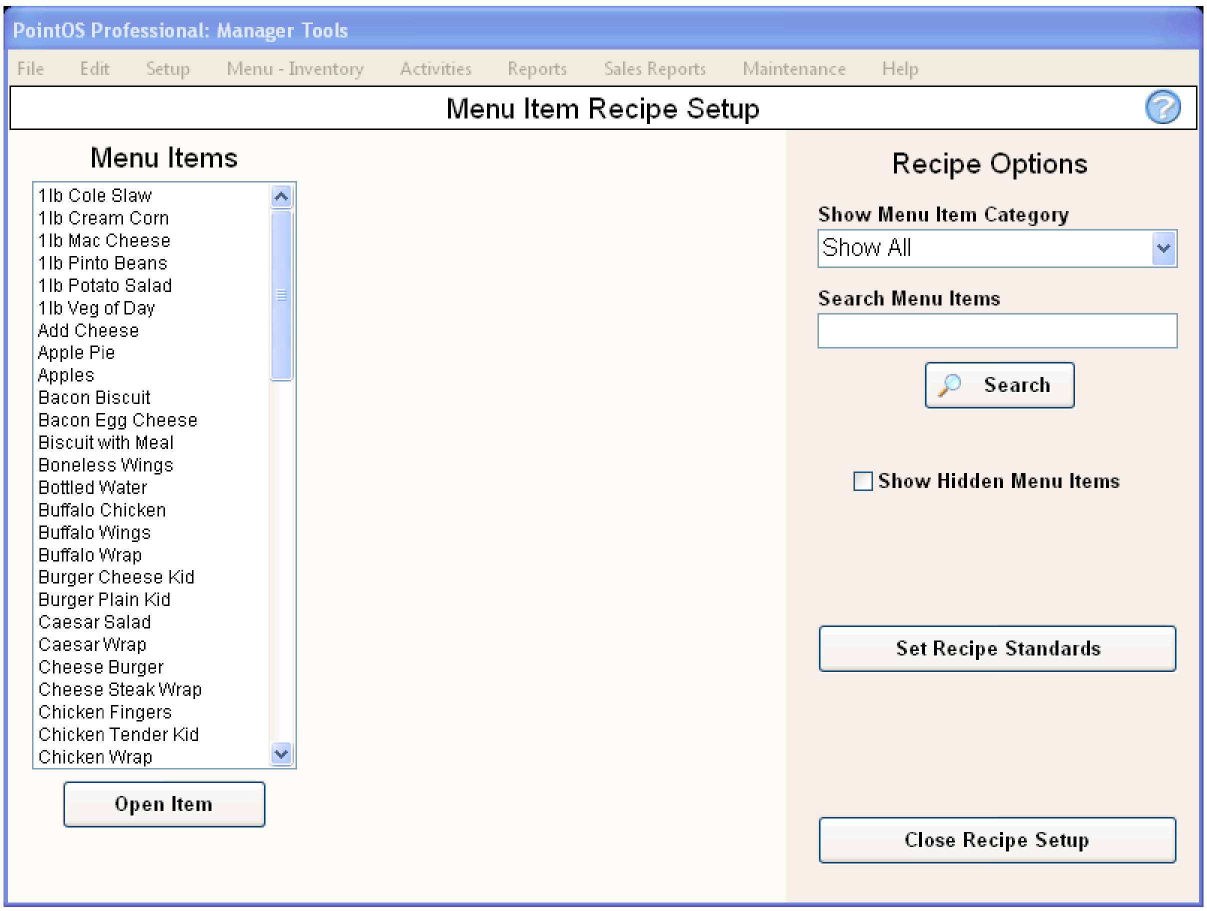


Figure 76: Menu Item Recipe Setup Screen

Menu Items

The left side of the screen lists your **Menu Items**. Menu items that are currently hidden are not listed. To include hidden items in the list, check the **Show Hidden Menu Items** box.

To narrow the list of menu items to one Menu Item Category, select a category from the **Show Menu Item Category** drop down list.

To search for a specific menu item, enter one or more letters in the **Search Menu Items** field and select **Search**. The system returns the **Menu Items** list that include any matches of those characters in that **Menu Item Category**.

To open the *Item Recipe Information* screen for a menu item, highlight the menu item in the **Menu Items** list and select **Open Item**. The system displays the *Item Recipe Information* for that menu item.

Recipe Standards

Recipe Standards help save time when entering recipes. Select **Set Recipe Standards** from the *Menu Item Recipe Setup* screen to open the **Recipe Standards** area.

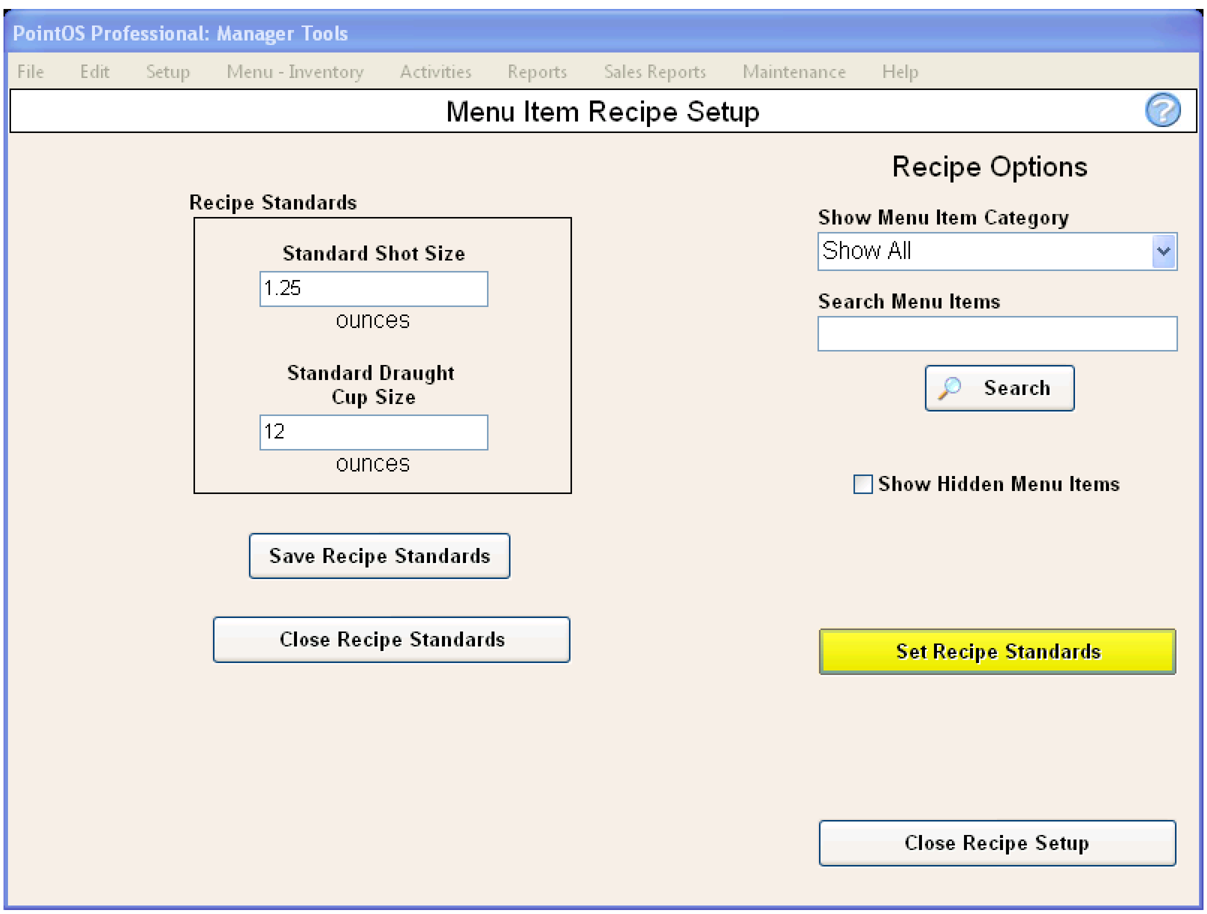


Figure 77: Recipe Standards

To set the recipe standards, complete the following steps:

1. Enter the standard number of ounces in the **Standard Shot Size** field.
2. Enter the **Standard Draught Cup Size** in ounces.
3. Select **Save Recipe Standards** to save the standards and return to the *Menu Item Recipe Setup* screen or select **Close Recipe Standards** to close the area without saving changes.

Close Recipe Setup

When you have finished setting up your recipes, select **Close Recipe Setup**.

Item Recipe Information

The *Item Recipe Information* screen allows you to select up to ten inventory items as ingredients in a recipe for the selected menu item. It also allows you to save serving directions and displays the calculated cost per serving.

To open the *Item Recipe Information* screen for a menu item, highlight the menu item in the **Menu Items** list on the *Menu Item Recipe Setup* screen and select **Open Item**.

The system displays the *Item Recipe Information* for that menu item.

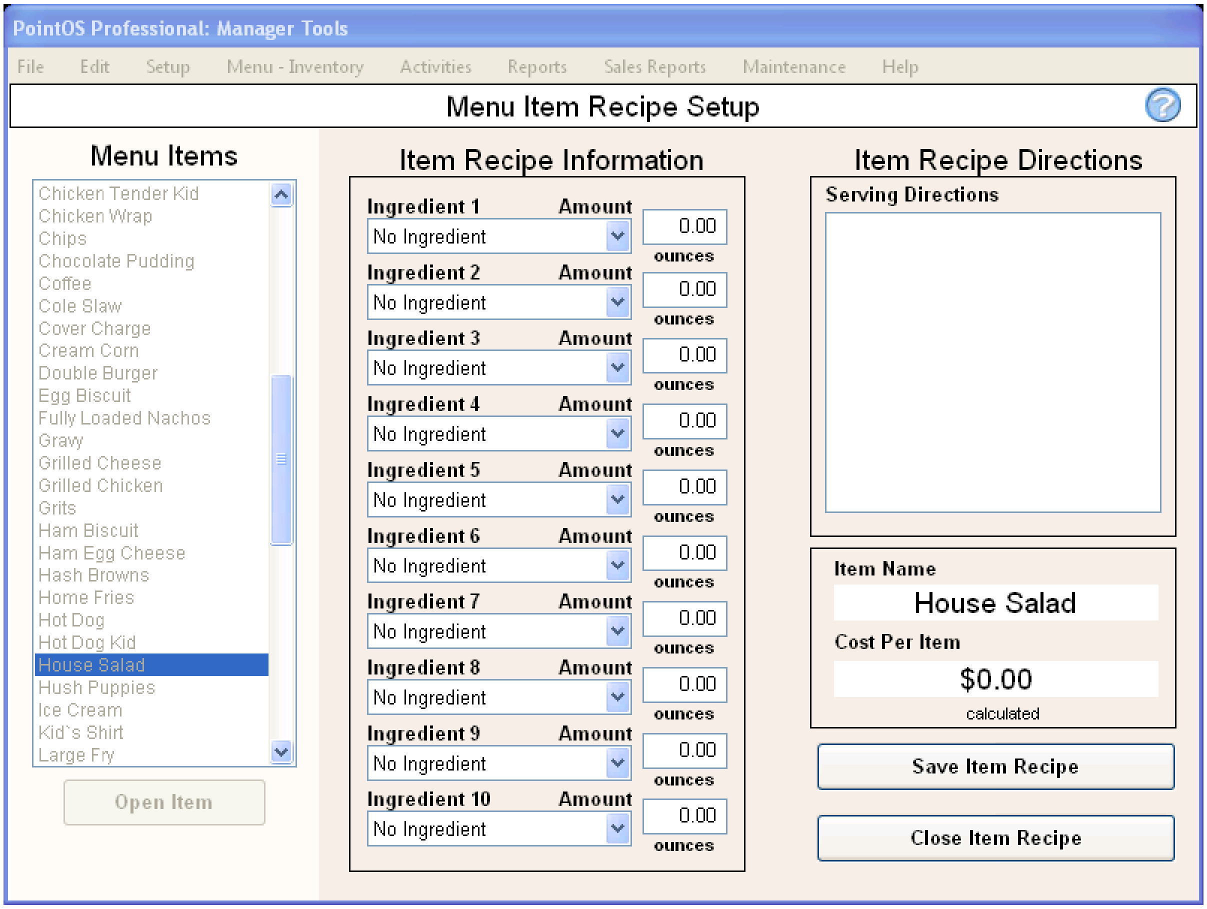


Figure 78: Item Recipe Information Screen

1. For up to ten ingredients, select the inventory item from the **Ingredient** drop down lists.
2. For each selected ingredient, enter the **Ingredient Amount**.
3. Enter any mixing or serving directions in the **Serving Directions** area. This information will be printed along with the recipe from the *Order Entry* screen.

The system displays the calculated **Cost Per Item** based on the ingredients selected and the information stored on the inventory item for each ingredient.

4. Select **Save Item Recipe** to save the recipe information.

Modifier Recipes

The *Modifier Recipe Setup* screen allows you to set up the ingredients that go into a modifier. The system then deducts these ingredients from inventory when you sell a menu item using that modifier. You can use modifiers to change a menu item by volume, percent, or add a new ingredient.

To open the *Modifier Recipe Setup* screen, select **Modifier Recipes** from the **Menu-Inventory** menu.

The system displays the *Modifier Recipe Setup* screen.

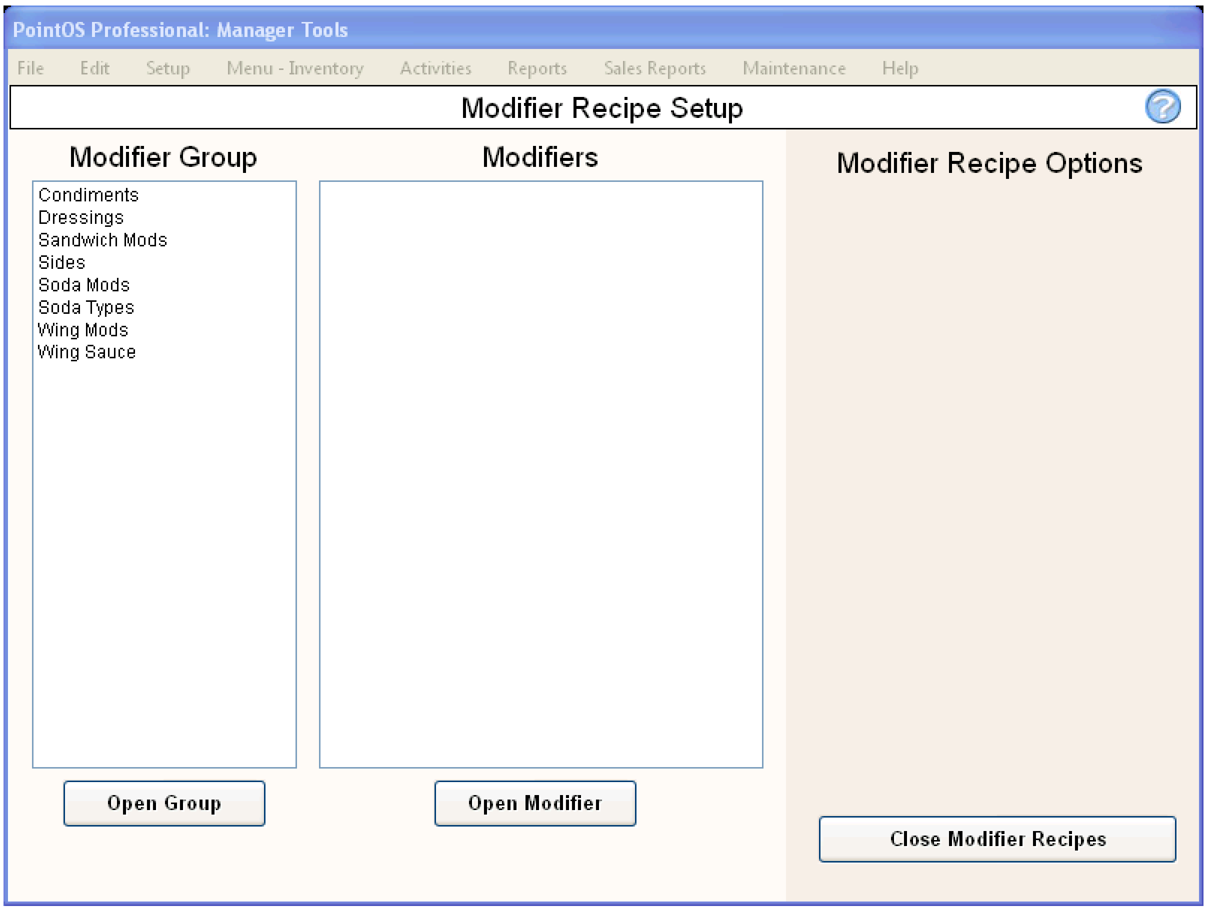


Figure 79: Modifier Recipe Setup Screen

The left side of the screen lists your Modifier Groups.

To open the *Modifier Recipe Information* screen for a modifier, complete the following steps:

1. Highlight the modifier group in the **Modifier Group** list.
2. Select **Open Group**.

The system displays the modifiers in that group in the **Modifiers** area.

3. Highlight the modifier you want to change in the **Modifiers** area.

4. Select **Open Modifier**.

The system displays the *Modifier Options* for that menu item.

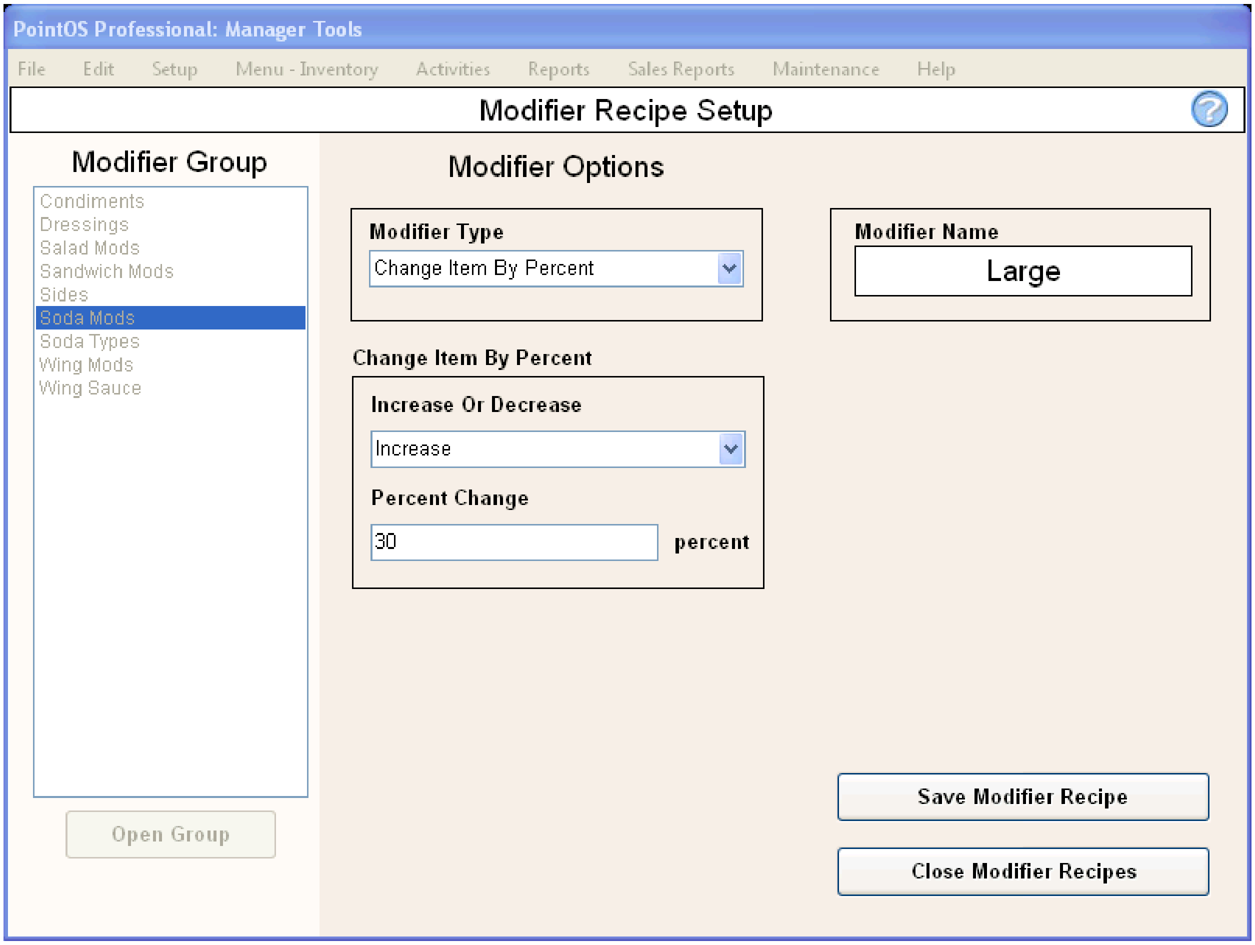


Figure 80: Modifier Options Screen

The *Modifier Options* screen allows you to choose from several options on how the selected modifier affects inventory. You can change the selected menu item by increasing or decreasing the volume (such as for a half drink or a tall drink). You can change the menu item by having it decrease or increase an item by a percent. You can also select to add another ingredient to a menu item.

To change the modifier options, complete the following steps:

1. If the modifier does not affect inventory, select **No Change To Inventory** from the **Modifier Type** drop down list.
2. To change a menu item by a percentage, complete the following steps:
   - Select **Change Item By Percent** from the **Modifier Type** drop down list.
   - Select **Increase** or **Decrease** from the **Increase or Decrease** drop down list.
   - Enter the percent change in the **Percent Change** field.

3. To change a menu item by volume, complete the following steps:
   - Select **Change Item By Volume** from the **Modifier Type** drop down list.
   - Select **Increase** or **Decrease** from the **Increase or Decrease** drop down list.
   - Enter the percent change in the **Volume Change** field.
4. To change a menu item by adding an ingredient, complete the following steps:
   - Select **Add Ingredient** from the **Modifier Type** drop down list.
   - Select the inventory item from the **Modifier Ingredient** drop down list.
   - Enter the amount in the **Ingredient Amount** field.
5. Select **Save Modifier Recipe** to save the recipe information.

Close Modifier Recipes

When you have finished setting up your modifier recipes, select **Close Modifier Recipes**.

Happy Hour Setup

The *Happy Hour Setup* screen allows you to control automatic pricing of items during happy hour times. During the times you set, the menu items will be automatically discounted.

To open the *Happy Hour Setup* screen, select **Happy Hour Setup** from the **Menu-Inventory** menu.

The system displays the *Happy Hour Setup* screen.

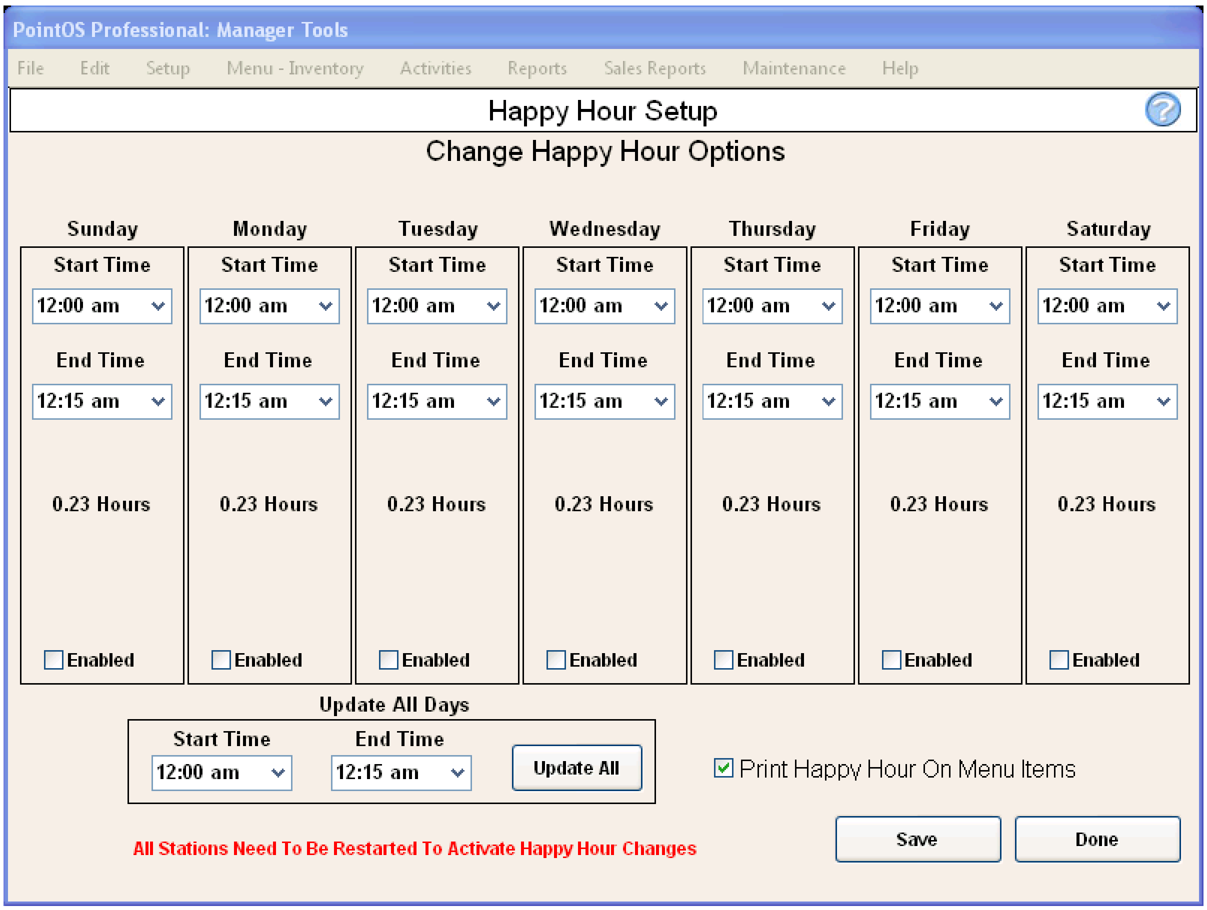


Figure 81: Happy Hour Setup Screen

To set your happy hour options, complete the following steps:

1. To set all days to the same happy hour complete the following steps:
   - Select the **Start Time** under the **Update All Days** area. Refer to the " the Time" section in this Manager Manual for more information on using the clock to set the time.
   - Select the **End Time** under the **Update All Days** area. The End Time can be the next day (i.e., happy hour runs from 9 p.m. to 4 a.m.).
   - Select **Update All**. The system updates each day with the selected **Start** and **End** times and checks the **Enabled** box.
2. To update the individual day happy hour times:
   - For each day, select the **Start Time**. Refer to the " the Time" section in this Manager Manual for more information on using the clock to set the time.
   - For each day, select the **End Time**.
   - For each day, check or uncheck the **Enabled** box to indicate whether the happy hour is in effect for that day.
3. Check the **Print Happy Hour on Menu Items** box, if desired.
4. Select **Save** to save the changes to the happy hour schedule. The system displays a message notifying you that the settings have been saved. Then it returns to the *Manager Dashboard*. If you want to close the *Happy Hour Setup* screen without saving changes, select **Done**.

Special Price Setup

The *Special Price Setup* screen will allow you to set up automatic pricing during the selected time and day. These prices overwrite any individual item specials for the selected time period.

To open the *Special Price Setup* screen, select **Special Prices Setup** from the **Menu-Inventory** menu.

The system displays the *Special Price Setup* screen.

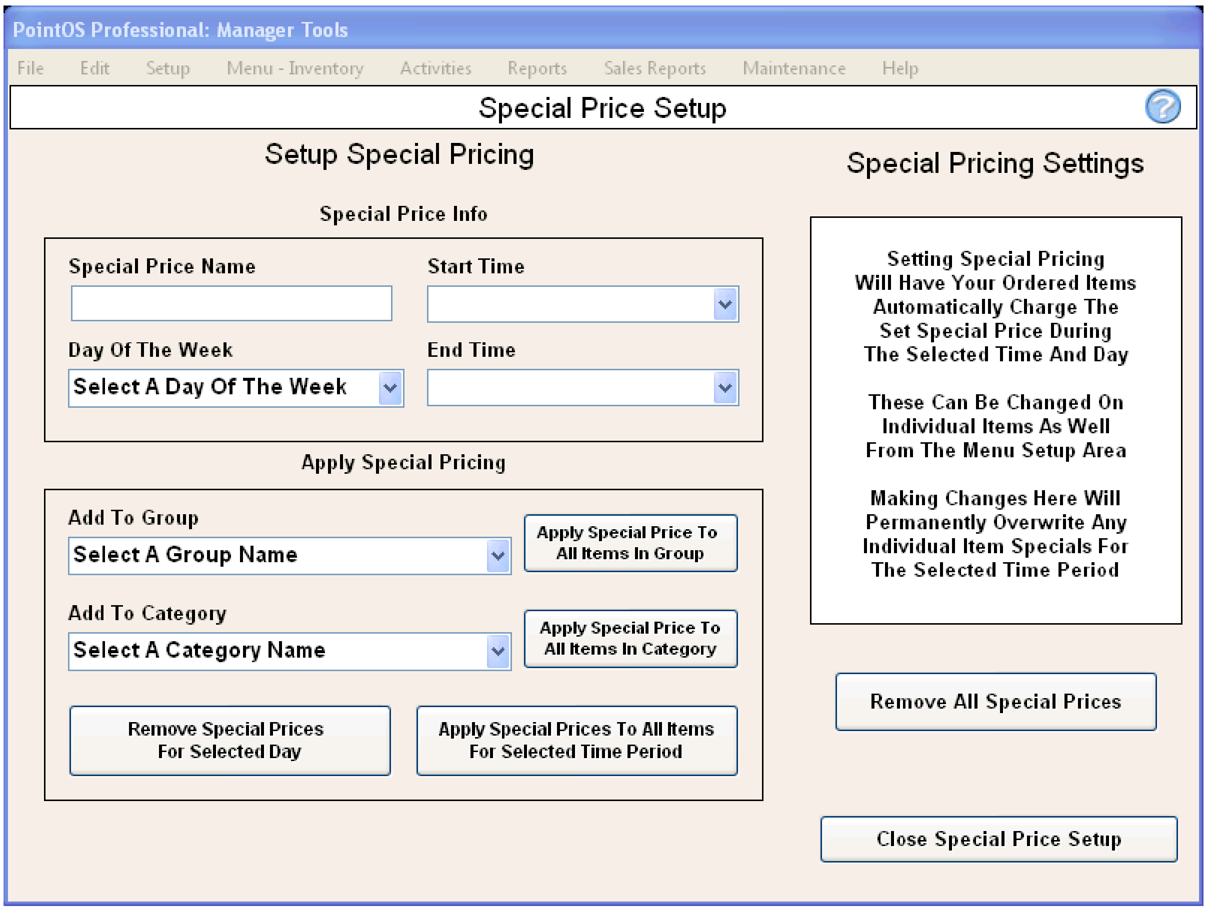


Figure 82: Special Price Setup Screen

To set up special pricing information, complete the following steps:

1. Enter a name for the special pricing in the **Special Price Name** field.
2. Enter the **Start Time** or select the drop down arrow to select the time.
3. Select a **Day of the Week** from the drop down list.
4. Enter the **End Time** or select the drop down arrow to select the time.
5. Apply the special pricing to menu items:
   - To apply the special pricing to all items in a group, select the group from the **Add to Group** drop down list. Select the **Apply Special Price the All Items in Group** button.
   - To apply the special pricing to all items in a category, select the category from the **Add to Category** drop down list. Select the **Apply Special Price to All Items in Category** button.
   - To apply the special pricing to all items during the selected time period, select the **Apply Special Prices to All Items for Selected Time Period** button.
6. To remove special pricing, choose one of the following:
   - Select the **Remove Special Prices for Selected Day** button to reset the special pricing for that day.
   - Select the **Remove All Special Prices** button to remove all special pricing.
7. Select the **Close Special Price Setup** button to close the screen when you have finished.

Menu Item List

The *Menu Item List* shows all menu items currently in the system, including the item category, minimum age requirements, whether there is a recipe for that item, and the cost of the item.

To open the *Menu Item List* screen, select **Menu Item List** from the **Menu-Inventory** menu.

The system displays the *Menu Item List* screen.

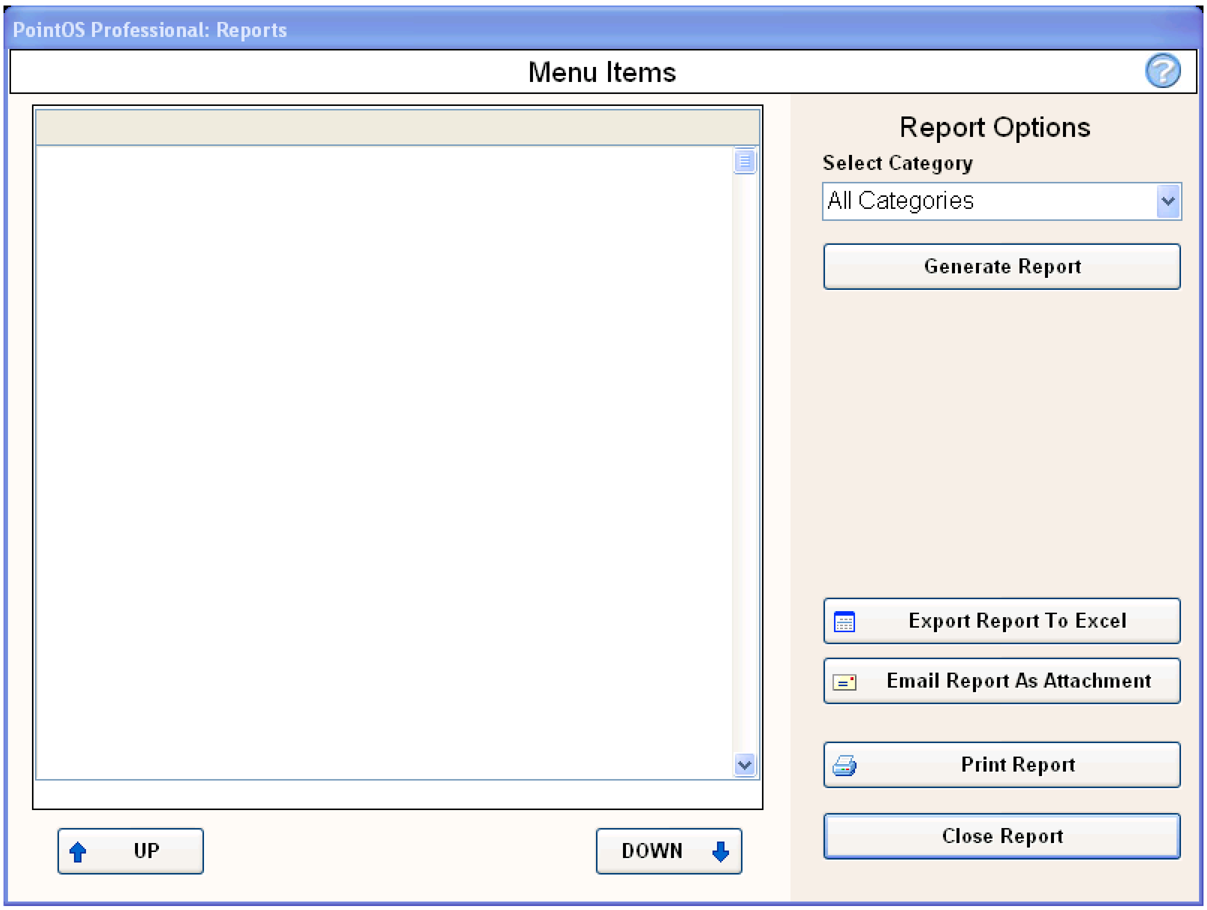


Figure 83: Menu Item List

To narrow the list of menu items to one **Menu Item Category**, select a category from the **Select Category** drop down list.

Select **Generate Report**.

The system displays the menu items. Use the **Up** and **Down** arrows to navigate through the list of menu items.

To export the report to Excel format, select **Export Report to Excel**. The system opens a *Save As* dialog box. Enter a name for the report and select **Save**. The report opens in Excel format.

To email the report, select **Email Report as Attachment**. The system opens the *Email Report* screen. Refer to the "Email Report" section in this Manager Manual for more information.

To print the report, select **Print Report**.

When you have finished viewing the *Menu Item List*, select **Close Report**.

Inventory Count

The *Inventory Item Counts* screen shows inventory items and allows you to enter physical counts of items. You can print an inventory report and use this information to figure out your inventory shrinkage.

You can sort the list by vendor, type, group, and/or location.

To open the *Inventory Item Counts* screen, select **Inventory Count** from the **Menu-Inventory** menu.

The system displays the *Inventory Counts* screen.

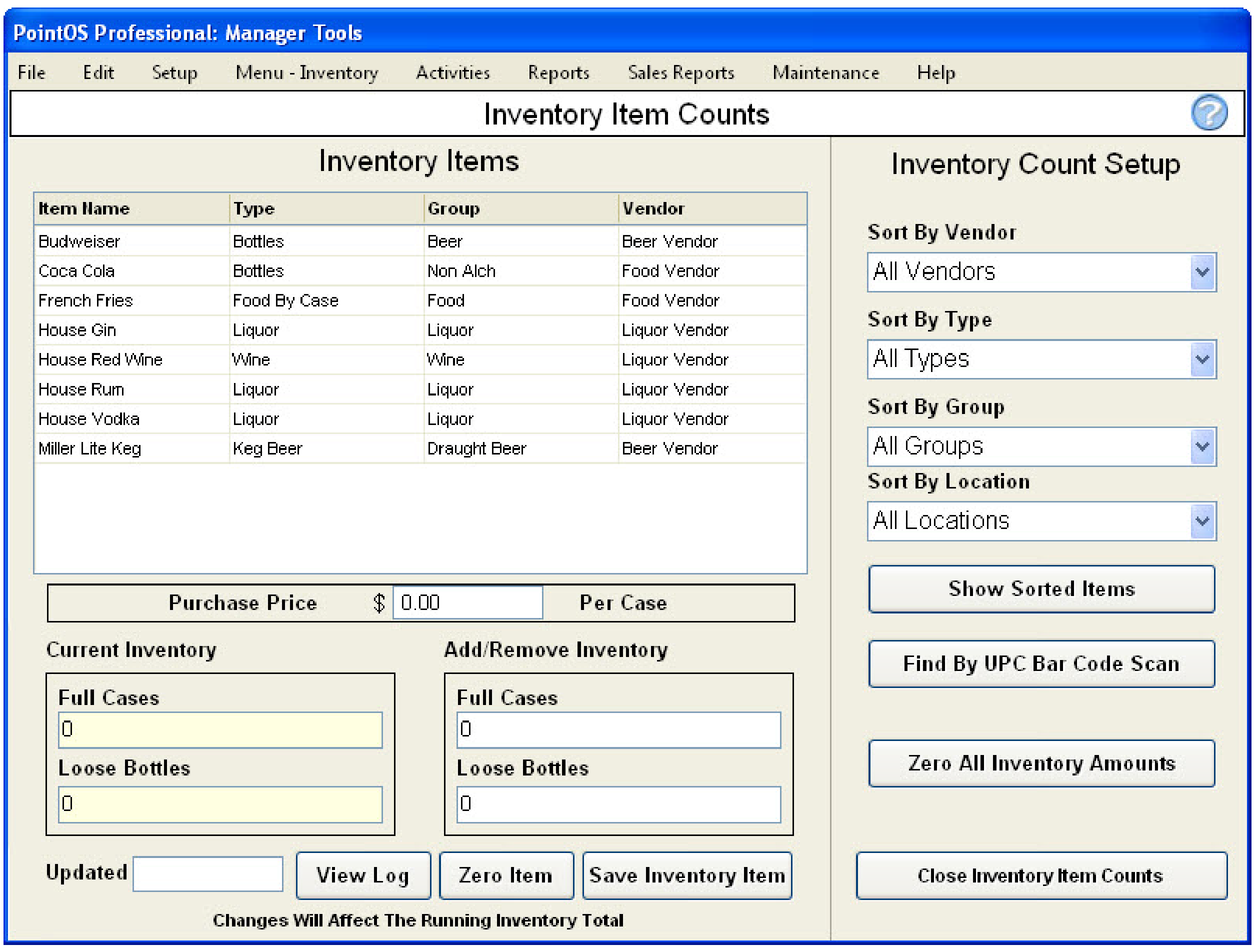


Figure 84: Inventory Counts Screen

To sort the **Inventory Items List**, complete the following steps:

1. Select a vendor from the **Sort by Vendor** drop down list, if desired.
2. Select an inventory type from the **Sort By Type** drop down list, if desired.
3. Select a group from the **Sort By Group** drop down list, if desired.
4. Select a location from the **Sort By Location** drop down list, if desired.
5. Select **Show Sorted Items**.

Alternatively, you can use your UPC scanner to find an item. Select **Find By UPC Bar Code Scan** and scan the item's barcode.

The system displays the **Inventory Items** that match your sorting requirements.

To adjust the inventory item counts, complete the following steps:

1. Highlight the **Inventory Item** you want to update in the **Inventory Items** list.
2. To update the Purchase Price for the item, enter a new **Purchase Price** per case.

The Current Inventory area lists the full and partial amounts on hand for that item as of the **Last Updated** date.

3. To add inventory, enter a number in the **Full** and **Loose** fields. To remove inventory, enter a minus sign followed by the number in the **Full** and **Loose** fields.
4. Select **Zero Item** to set the current inventory for this item to zero.

NOTE: This item is to start your inventory over. Warning! This cannot be undone and will reset all inventory items to zero.

5. Select **View Log** to view the *Inventory Log* screen for this item. Refer to the " Item Log" section in this Manager Manual for more information.
6. Select **Save Inventory Item**. Changes made to inventory from the Manager area are available in the Inventory Change Report.

When you have finished your inventory update, select Close **Inventory Item Counts**.

Print Count Sheet

Count sheets are blank worksheets that include all inventory items. This is useful for doing a physical inventory count of your location. The Print Count Sheet option allows you to print the count sheet, export it as an HTML file, export it as a PDF file, export it as an RTF file (which can be opened in Microsoft Word), or view the count sheet on screen.

To open the *Inventory Count Sheet* screen, select **Print Count Sheet** from the **Menu-Inventory** menu.

The system displays the *Inventory Count Sheet* screen.

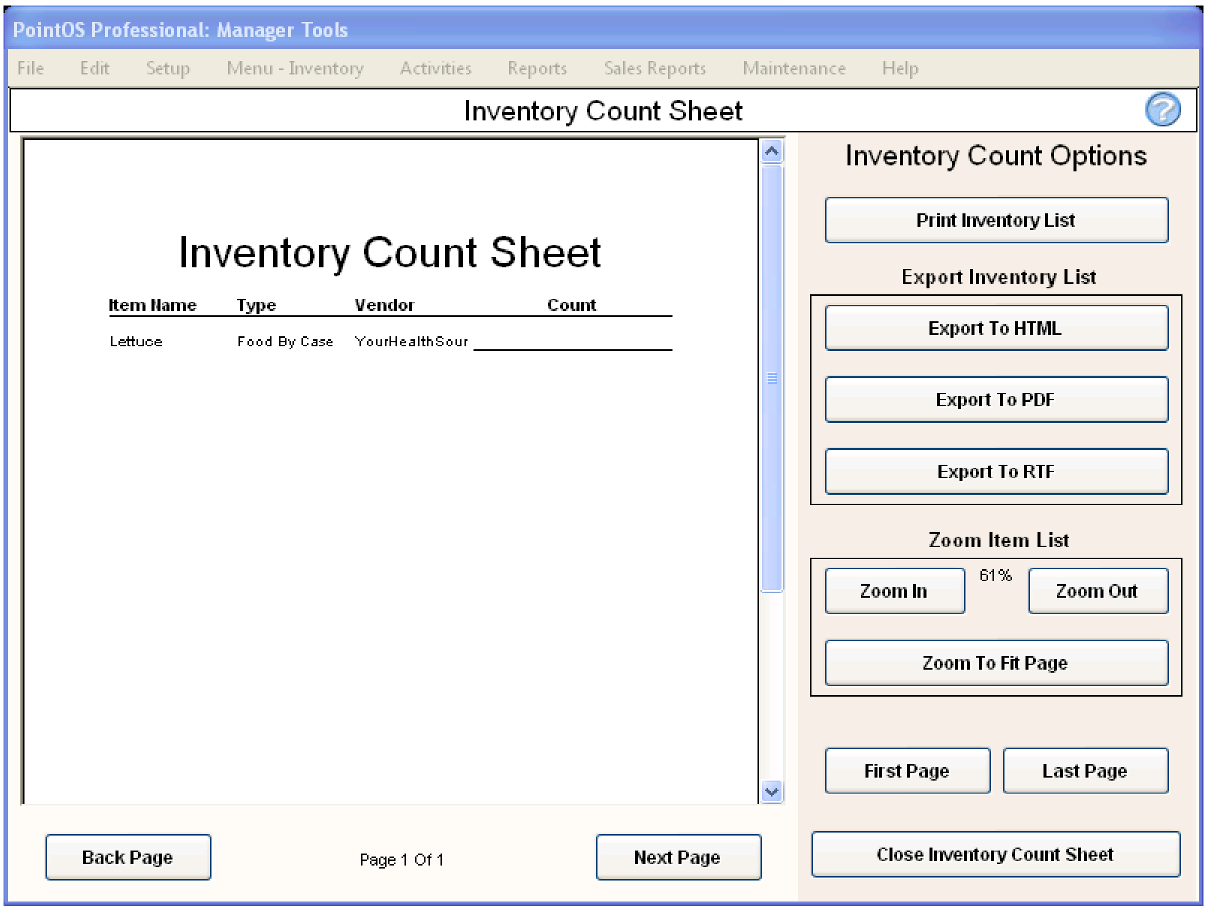


Figure 85: Inventory Count Sheet

To print the count sheets, select the **Print Inventory List**. button.

NOTE: Your report printer must be setup. Refer to the " Printer Setup" section in this Manager Manual for more information. The system prints the count sheets on your report printer.

To export the list to HTML, select the **Export to HTML** button. The list opens in your default browser.

To export the list to PDF, select the **Export to PDF** button. The list opens in Adobe Reader.

To export the list to RTF, select the **Export to RTF** button. The list opens in your default word processor.

To adjust the view of the on-screen list, select **Zoom In**, **Zoom Out**, or **Zoom to Fit Page**.

To navigate to a different page of the list, select **Back Page**, **Next Page**, **First Page** or **Last Page**.

When you have finished, select **Close Inventory Count Sheet**.

Activities Menu

Overview

The **Activities** Menu includes options to many of the functions that you will use to schedule and manage your bar, club, or restaurant. You can create schedules for employees and entertainment. You can also manage your customer information.

Adjust Time Cards

The **Adjust Time Cards** screen allows you to adjust, correct, or delete an employee's time card.

To open the *Adjust Time Cards* screen, select **Adjust Time Cards** from the **Activities** menu.

The system displays the *Adjust Time Cards* screen.

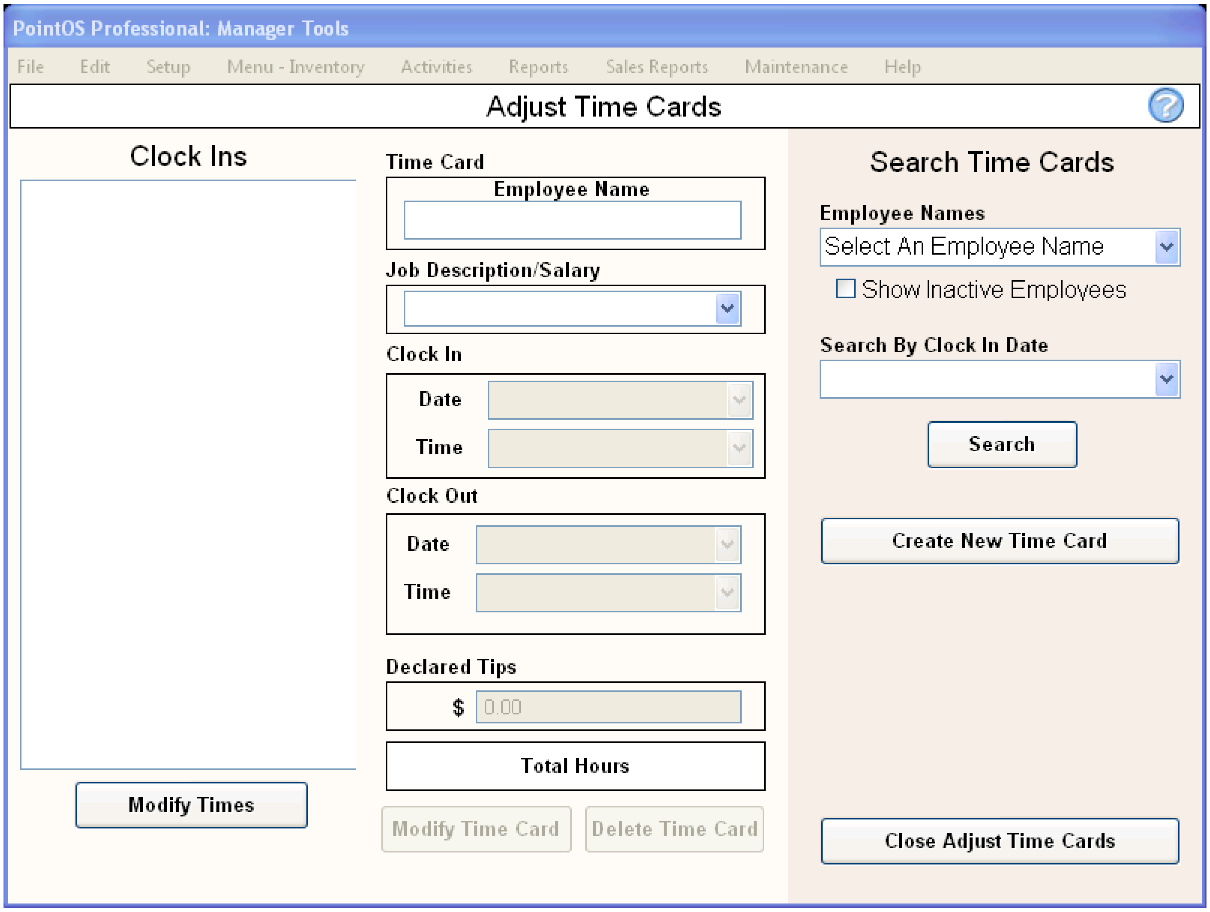


Figure 86: Adjust Time Cards Screen

Create New Time Card

1. Select the **Create New Time Card** button.
2. Select the **Employee Name** from the drop down list.
3. Select the Job Description/Salary from the **Job Description/Salary** drop down list.
4. Enter the **Clock In Time** by using the calendar and clock on the **Clock In Date** and/or **Clock In Time** drop down lists.
5. Change the **Clock Out Time** by using the calendar and clock on the **Clock Out Date** and/or **Clock Out Time** drop down lists.

The system displays the total number of hours worked.

6. Enter the amount for the **Declared Tips**, if necessary.
7. Select **Save Time Card**.

The system displays a message alerting you that the time card has been saved.

Find a Time Card to Adjust

The left side of the *Adjust Time Cards* screen lists your employees' clock in times. To search for a particular time card in the list, complete the following steps:

1. Select an employee name from the **Employee Names** drop down list. To include inactive employees in the list, check the **Show Inactive Employees** box.
2. Select the drop down list next to **Search by Clock in Date** to find a time card on a specific date. Select the appropriate date from the calendar.
3. Select **Search**.

The system displays any time cards that match the search criteria in the *Clock Ins* area.

Adjust a Time Card

To correct a past time card, complete the following steps:

1. Highlight the time card you want to adjust in the **Clock Ins** area.
2. Select **Modify Times**.

The system displays the time card details in the middle of the *Adjust Time Cards* screen.

3. If the employee uses more than one job description/salary, you can select a new salary from the **Job Description/Salary** drop down list.
4. Change the **Clock In Time** by selecting a new options from the **Clock In Date** and/or **Clock In Time** drop down lists.
5. Change the **Clock Out Time** by selecting a new options from the **Clock Out Date** and/or **Clock Out Time** drop down lists.

The system displays the total number of hours worked.

6. Select **Modify Time Card**.

The system displays a message alerting you that the time card has been updated.

Delete a Time Card

To delete a past time card, complete the following steps:

1. Highlight the time card you want to delete in the **Clock Ins** area.
2. Select **Delete Time Card**.

The system displays a warning message to verify that you want to delete this time card.

3. Select **Yes** to continue or **No** to close the warning without deleting the time card.

The system displays a message alerting you that the time card has been deleted.

Close the Time Cards

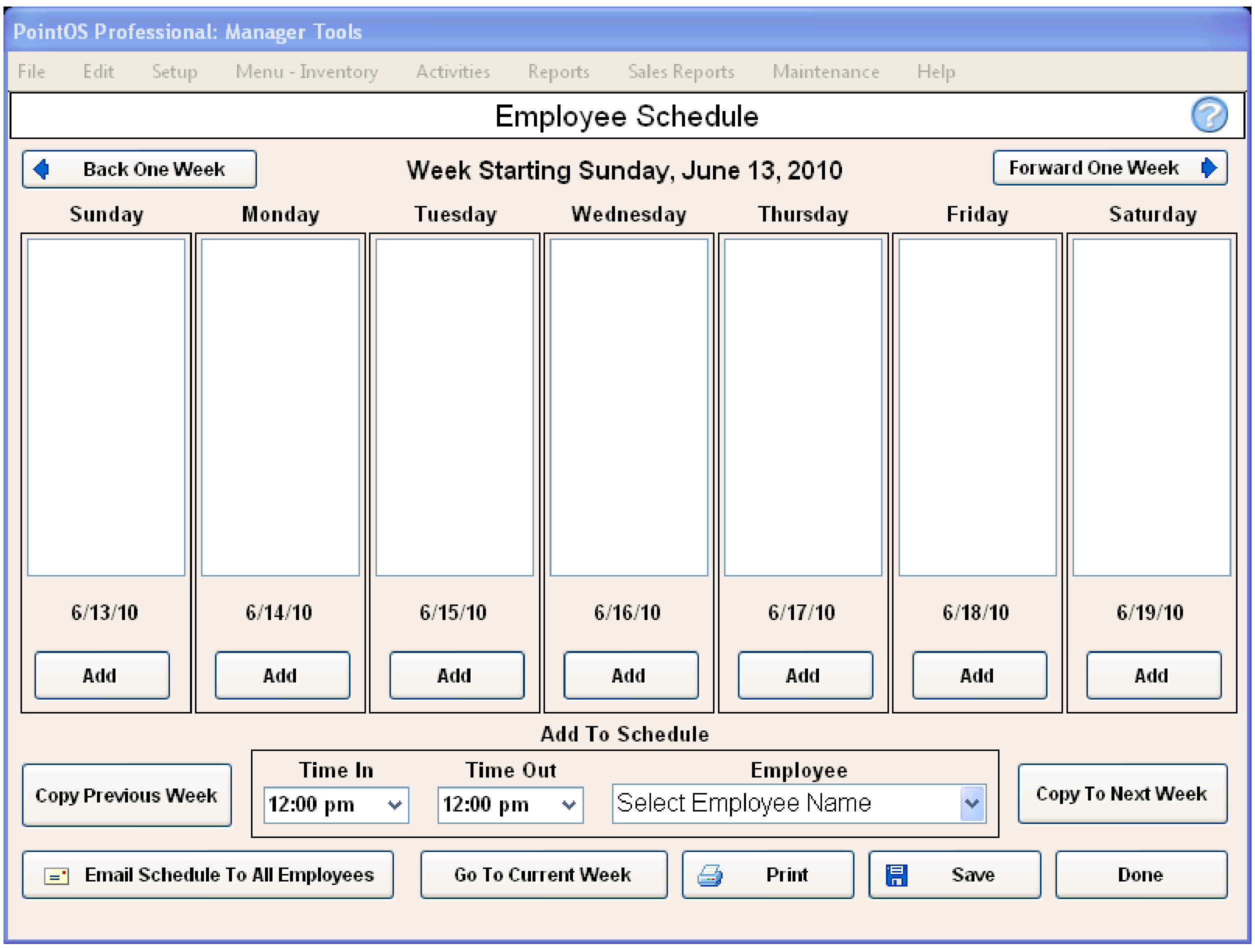
When you have finished adjusting time cards, select **Close Adjust Time Cards**.

Employee Schedule

The *Employee Schedule* screen allows you to set up the weekly schedule for employees. Employees can view this schedule from the *Time Clock* area of PointOS.

To open the *Employee Schedule* screen, select **Employee Schedule** from the **Activities** menu.

The system displays the *Employee Schedule* screen.



Navigate the Employee Schedule

Select **Back One Week** to go to the previous week's schedule.

Select **Forward One Week** to go to the next week's schedule.

Select **Go To Current Week** to return to the schedule for the current week.

Select **Print** to print the currently displayed schedule.

Create an Employee Schedule

Complete the following steps to create an employee schedule.

1. Select the employee from the **Employee** drop down list.
2. Select the starting time from the **Time In** drop down list.
3. Select the ending time from the **Time Out** drop down list.
4. Select **Add** on the day(s) to add that employee at the selected time.
5. Repeat for all the days that employee works, selecting a new **Time In** and **Time Out** for different days as necessary.
6. Repeat for all of the employees.
7. Select **Save** to save the schedule information.

You can also speed scheduling up by copying a schedule.

1. Select **Copy Previous Week** to copy the previous week's schedule to the current week.
2. Select **Copy To Next Week** to copy the current schedule to the next week.

Email the Schedule to Employees

You can email the employee schedule to all employees that have an email addresses in the employee profile.

NOTE: You must have set up email on your system. Refer to the " Setup" section in this Manager Manual for more information.

1. Select **Email Schedule to All Employees**.

Close the Employee Schedule

When you have finished creating the employee schedule, select **Done**.

Employee Contact Information

The *Employee Contact Information* screen allows you to contact information of all employees in your database. This list can be exported to several different formats.

To open the *Employee Contact Information* screen, select **Employee Contacts** from the **Activities** menu.

The system displays the *Employee Contact Information* screen.

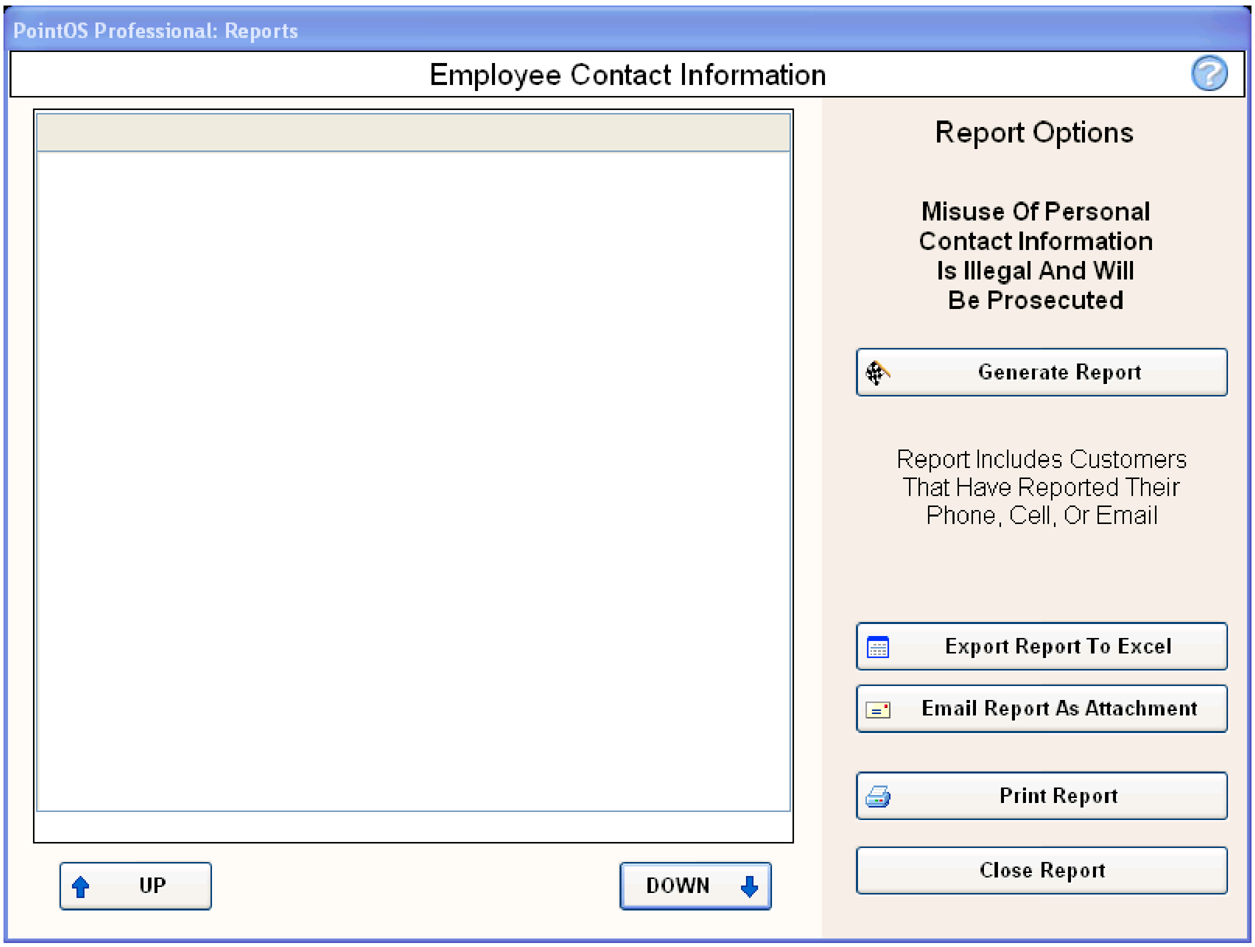


Figure 87: Employee Contact Information

Select **Generate Report** to view employee's name, phone, cell phone, and email addresses. Use the **Up** and **Down** arrows to scroll through a long list of employees.

To print the employee contact information, select **Print Report**.

To open the employee contact information in Excel, select **Export Report To Excel**.

To email the report, select **Email Report as Attachment**. Refer to the "Email Report" section in this Manager Manual for more information on emailing reports.

When you have finished viewing the employee contacts, select **Close Report**.

Print All Employee Information

The **Print All Employee Information** option immediately prints a report that includes all employee profile information.

To print the employee information, select **Print All Employee Information** from the **Activities** menu.

The system displays a dialog box to make sure you want to print the employee information. Select **Yes** to continue or **No** to close the dialog box without printing the information.

The information prints on your default report printer.

View Schedule Requests

If employees want to change their schedules, they can make schedule requests from the *Time Clock* area. The *View Schedule Requests* screen allows you to review, approve, or decline employee scheduling requests to help in creating your employee work schedule. The system notifies employees about the status of their requests.

To open the *View Schedule Requests* screen, select **View Schedule Requests** from the **Activities** menu.

The system displays the *View Schedule Requests* screen.

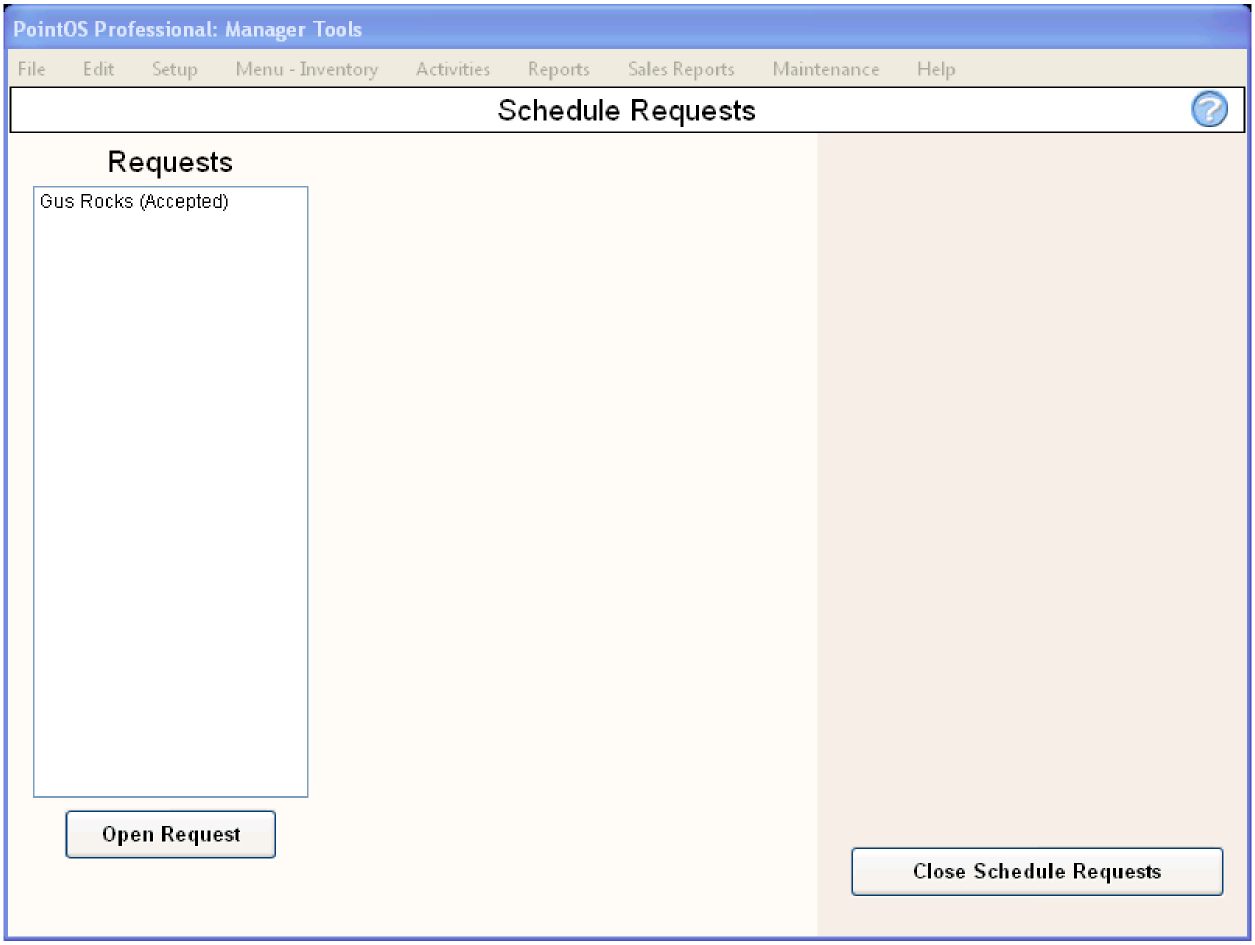


Figure 88: Schedule Requests Screen

The system displays a list of any schedule requests, including the status of the request, in the **Requests** area.

1. Highlight the request you want to review.
2. Select **Open Request**.

The system displays the **Request Information**.

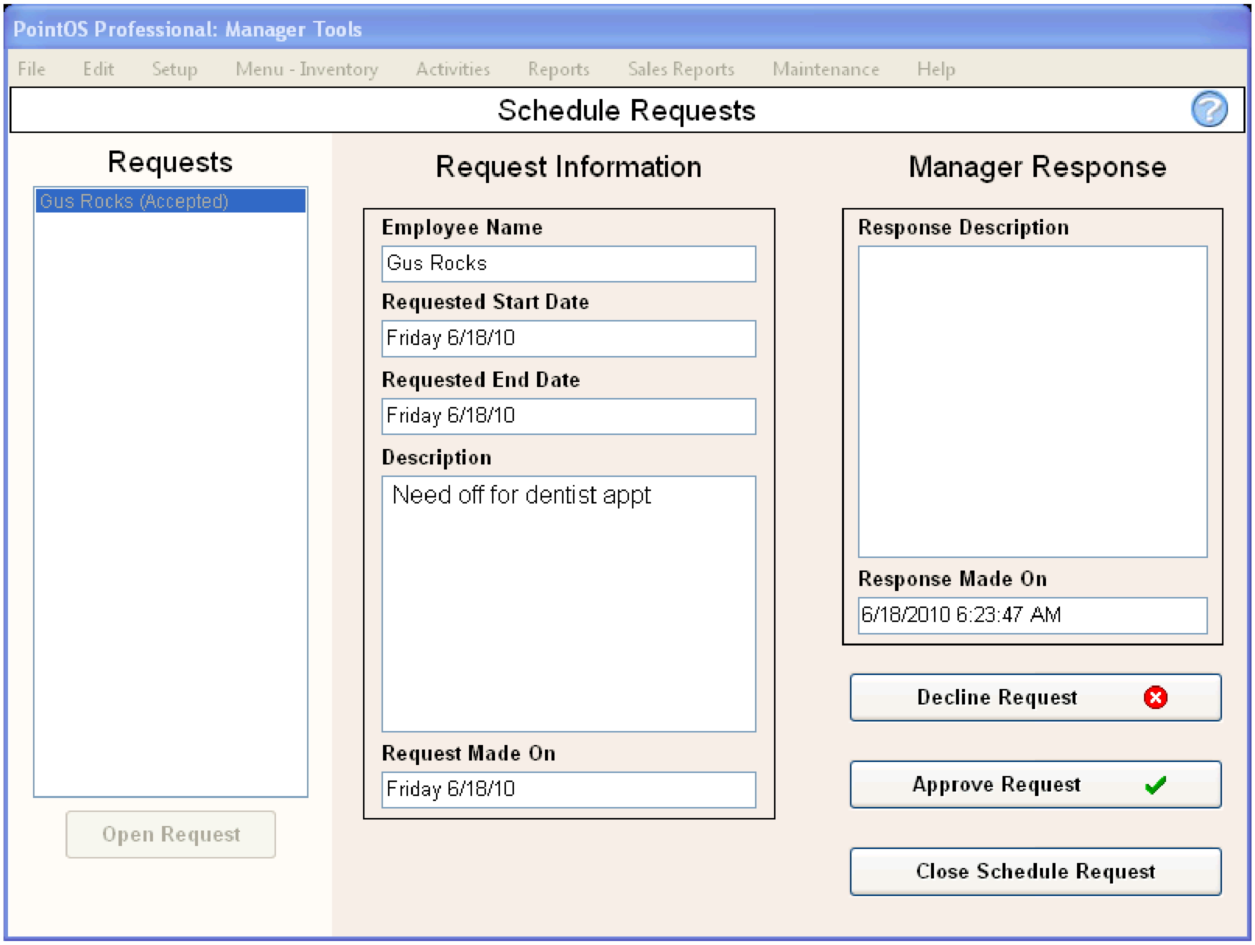


Figure 89: Schedule Request Information

The **Request Information** includes the employee's name, the start date of the request, the end date of the request, a description of the request, and the date the employee made the request. To respond to the request, complete the following steps:

1. Enter a message to describe your response, if desired, in the **Response Description**.
2. To decline the request, select **Decline Request**. To approve the request, select **Approve Request.**

When the employee goes to the *Time Clock* screen, the system displays a message indicating whether the request is approved or declined, with any description you provided in the **Response Description**. The employee can reply if necessary.

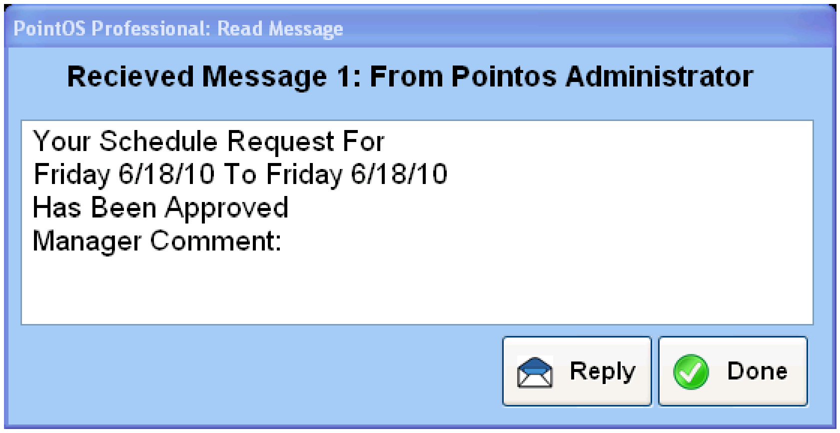


Figure 90: Manager Response to Schedule Request

Close the View Schedule Requests Screen

When you have finished viewing a request, select **Close Schedule Request**.

Select **Close Schedule Requests** to close the screen.

Customer Activities

The *Customer Activities* screen allows you to see a list of customers, search for an existing customer, or add a new customer.

To open the *Customer Activities* screen, select **Add/Edit Customers** from the **Activities** menu.

The system displays the *Customer Activities* screen.

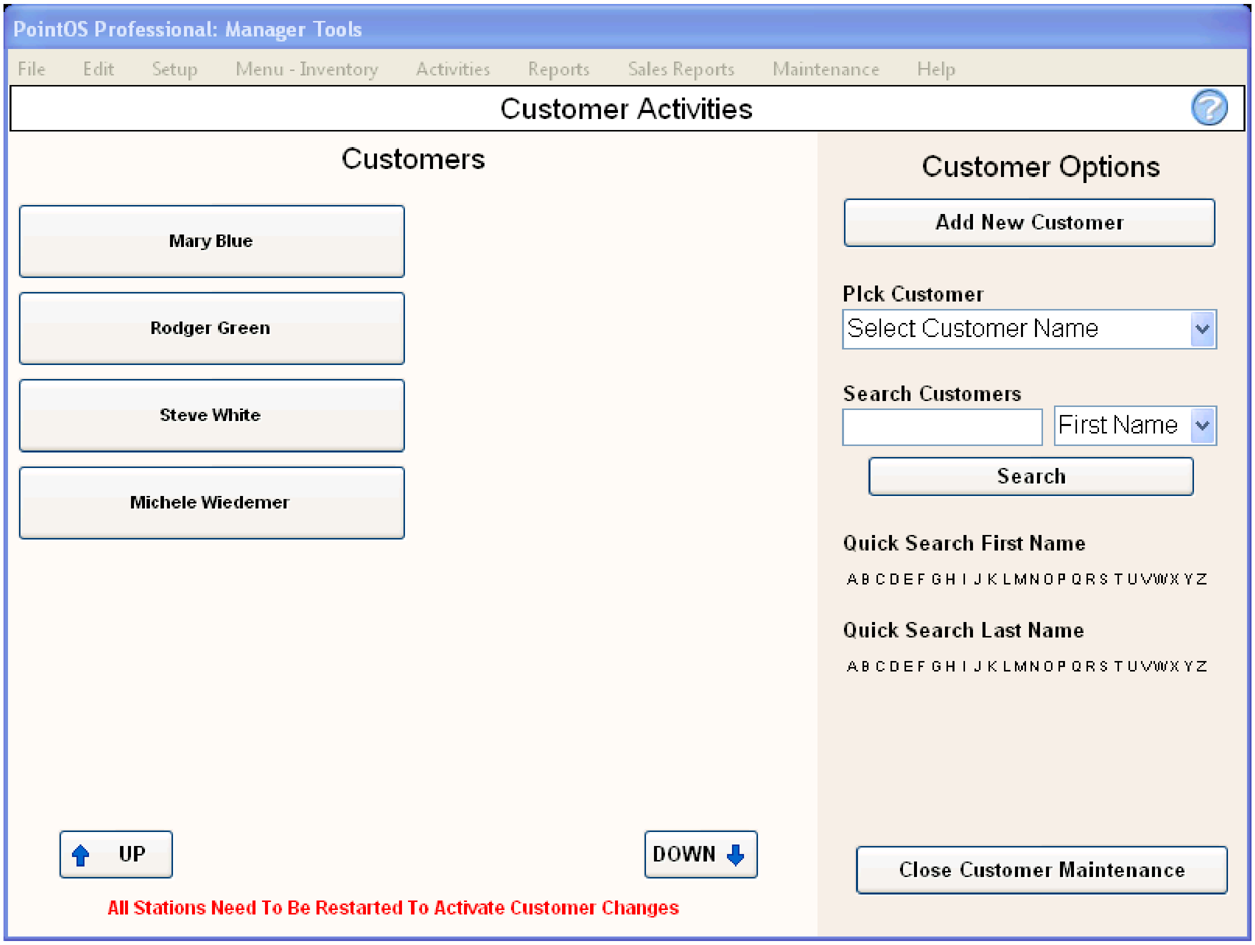


Figure 91: Customer Activities Screen

The *Customers* area lists the customers in your system. Use the **Up** or **Down** arrows to navigate through the list.

To find a specific customer, you can select the customer's name from the **Pick Customer** drop down list. Or complete the following steps to search for a customer.

1. Enter one or more letters in the **Search Customers** field.
2. Select whether those letters are from the customer's first name or last name from the drop down list.
3. Select **Search**.

The system displays the customer record(s) that match your search criteria in the *Customers* area.

You can also select a letter from the **Quick Search First Name** or **Quick Search Last Name** to narrow the list to customers whose name starts with the selected letter.

To open the *Change Customer Options* screen, select the customer you want to update or select **Add New Customer**. Refer to the "Change Customer Options" section in this Manager Manual for more information.

When you have finished viewing the customer list, select **Close Customer Maintenance**.

Change Customer Options

The *Change Customer Options* screen allows you to maintain several details about your customers, including a scanned driver's license and setting special customer pricing. If you want to scan the customer's driver's license, you must have a compatible scanner. Add the customer from the front end *Order Entry -Start New Tab -New Customer* screen. The *New Customer* screen on the front end is the only entry point for photos. Then you can view the data on this screen.

NOTE: Make sure to get the customer's permission before collecting his or her data. You must follow all local and federal privacy laws.

To open the *Change Customer Options* screen, go to the *Customer Activities* screen and select the desired customer or select **Add New Customer**.

The system displays the *Change Customer Options* screen.

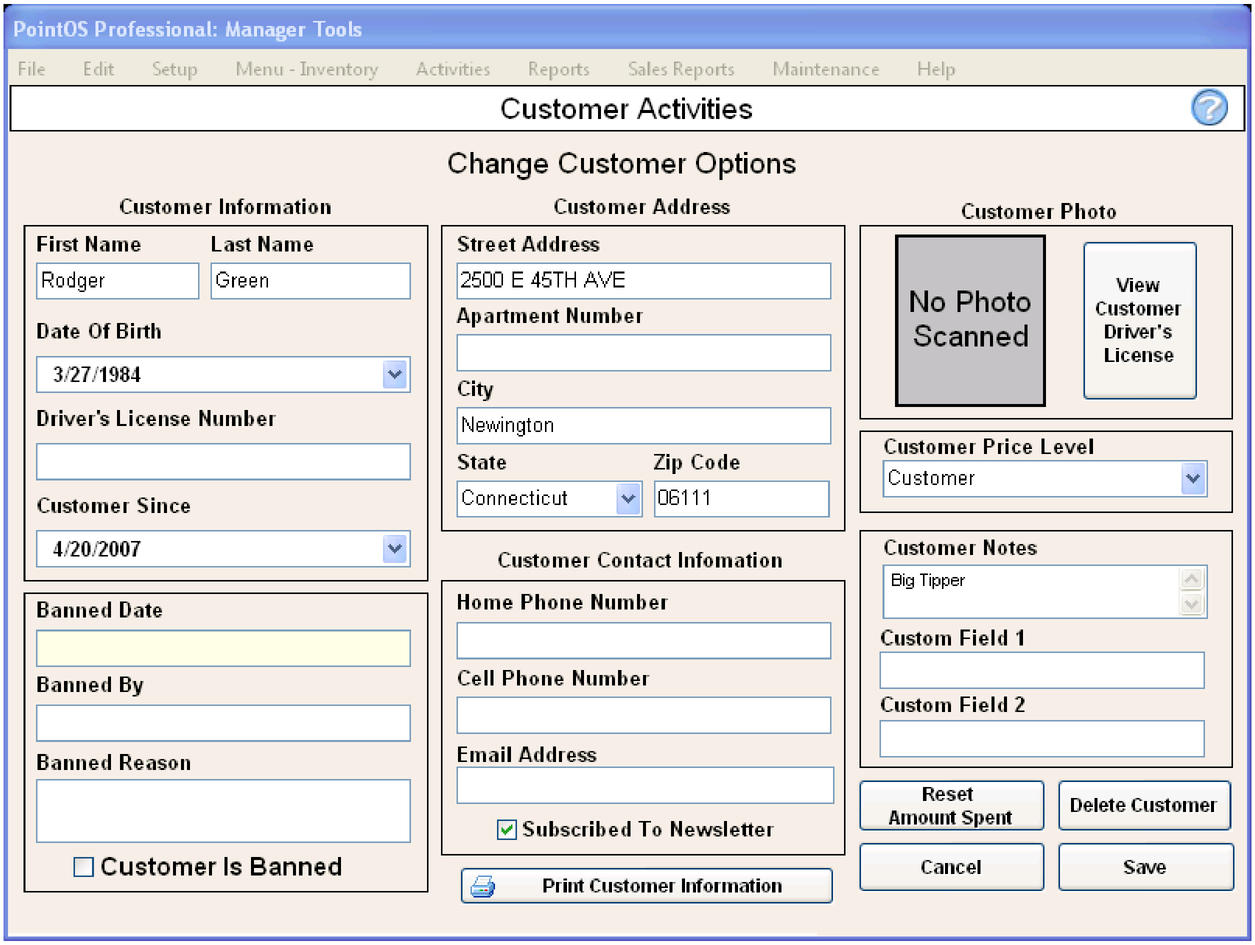


Figure 92: Change Customer Options Screen

Enter New Customer or Update Existing Customer

1. Enter or update the **Customer Information**:
    - Enter the customer's **First Name**.
    - Enter the customer's **Last Name**.
    - Enter the day/month/year of the customer's **Date of Birth** or select the drop down arrow to use the calendar.
    - Enter the customer's **Driver's License Number**.
2. Enter or update the **Customer Address**:
    - Enter the customer's **Street Address**.
    - Enter the customer's **Apartment Number**, if applicable.
    - Enter the customer's **City**.
    - Select the customer's **State** from the drop down list.

- Enter the customer's **Zip Code**.

3. Enter or update the Employee Contact Information:
    - Enter the customer's **Home Phone Number**.
    - Enter the customer's **Cell Phone Number**.
    - Enter the customer's **Email Address**.
4. Check the **Subscribed to Newsletter** box to put the customer on the newsletter mailing list. If the customer wants to unsubscribe, uncheck the box to remove the customer from the newsletter mailing list.
5. If you have added the customer from the front end *Order Entry -Start New Tab -New Customer* screen, the photo is displayed here.
6. If the customer's driver's license has been scanned, select **View Customer's Driver's License** to see the *Driver's License Photo* screen. Select **Close** when you have finished viewing the license.
7. To give the customer special pricing, select a pricing option from **Customer Price Level** drop down list.
8. Enter any notes you'd like to keep about the customer in the **Customer Notes** field.
9. To include additional information about the customer, you can enter it in **Custom Field 1** or **Customer Field 2**.
10. Select **Save** button to complete the *Change Customer Options* screen or select **Cancel** to close the *Change Customer Options* screen without saving.

Ban Customer

To ban a customer, complete the following steps:

1. Check the **Customer is Banned** box.

The system enters the date and the name of the employee who banned the customer.

2. Enter a reason for banning the customer in the **Banned Reason** field.

To unban the customer, uncheck the **Customer is Banned** box.

3. Select **Save** button to complete the *Change Customer Options* screen or select **Cancel** to close the *Change Customer Options* screen without saving.

Reset Amount Spent

To reset the amount of money the selected customer has spent to zero, complete the following steps:

1. Select **Reset Amount Spent**.

The system displays a dialog box to make sure that you want to reset the amount of money the customer has spent to zero. It displays the amount the customer has spent.

2. Select **Yes** to reset the amount. Or select **No** to close the dialog box without resetting the amount spent.
3. The system displays a confirmation message indicating that the amount has been reset to zero. Select **OK** to close the message.

Delete Customer

1. Select **Delete Customer**.

The system displays a warning to verify that you want to delete this customer.

2. Select **Yes** to continue or **No** to close the warning without deleting the customer.

Customer Mail List

The *Customer Mail List* screen allows you to view a mailing list of all customers in your database. This list can be exported to several different formats or used to create mailing address labels.

To open the *Customer Mail List* screen, select **Customer Mail List** from the **Activities** menu.

The system displays the *Customer Mail List* screen.

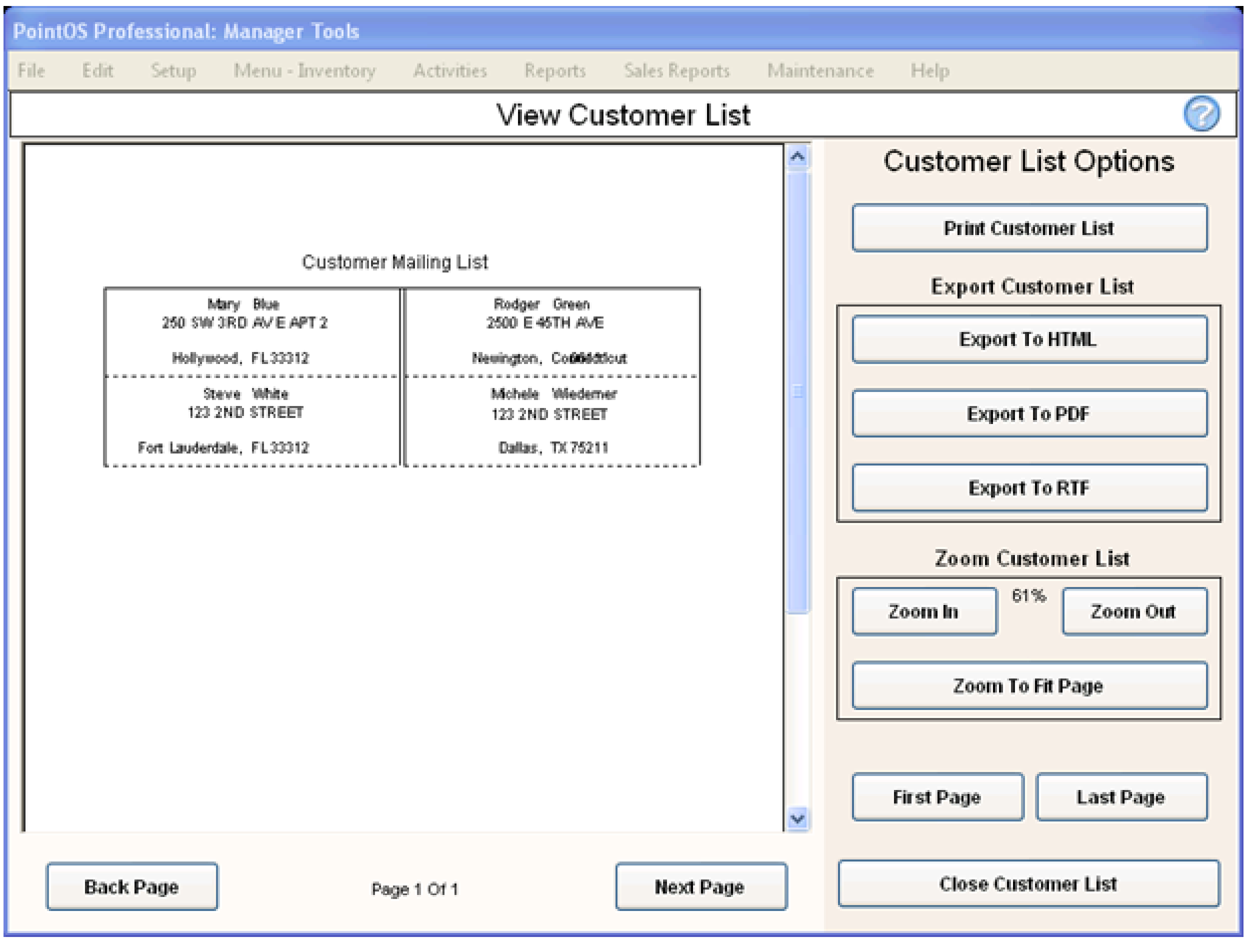


Figure 93: View Customer List Screen

Customer Mailing List

The left side of the screen shows the customer mailing list. You can use the **Back Page** and **Next Page** arrows to navigate through several pages of customer labels. Select **First Page** to go to the first page of the list. Select **Last Page** to go to the last page of the list.

To print the customer mailing list on Avery Mailing Labels, select **Print Customer List**.

To change the view of the customer mailing list, you can use the Zoom features:

- Select **Zoom In** one or more times to enlarge the view of the customer mailing list.
- Select **Zoom Out** one or more times to reduce the view of the customer mailing list.
- Select **Zoom to Fit Page** to return the view of the customer mailing list to one page width.

Export Customer List

You can export your customer list to three different formats:

- To open the customer list in HTML (in your default web browser), select **Export to HTML**.
- To open the customer list in Adobe PDF©, select **Export to PDF**.
- To open the customer list in your default word processor in the RTF format, select **Export to RTF**.

Close Customer List

When you have finished viewing the customer list, select **Close Customer List**.

Customer Contact Information

The *Customer Contact Information* screen allows you to contact information of all customers in your database. This list can be exported to several different formats.

To open the *Customer Contact Information* screen, select **Customer Contacts** from the **Activities** menu.

The system displays the *Customer Contact Information* screen.

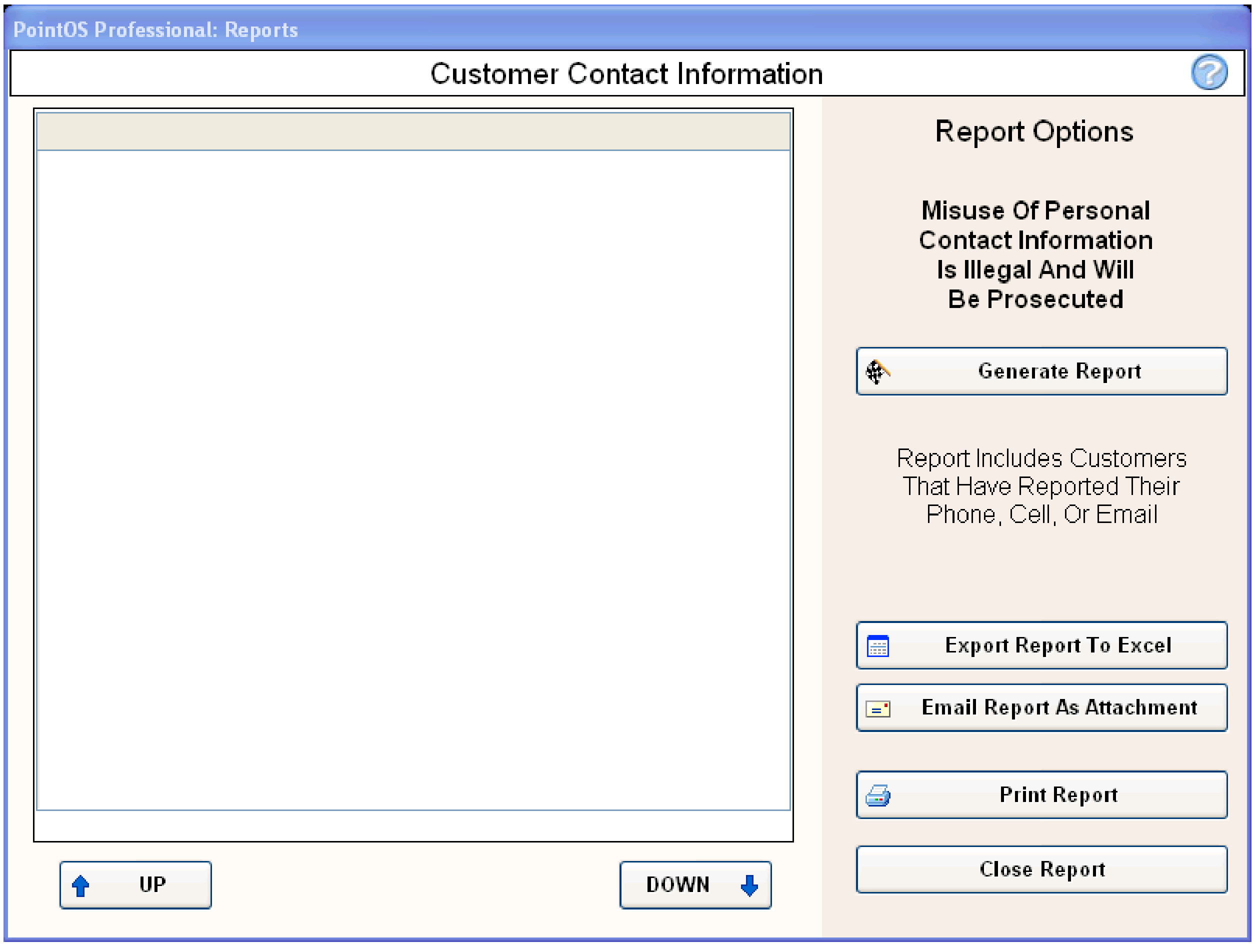


Figure 94: Customer Contact Information

Select **Generate Report** to view customers who have provided contact information. It includes their names, phone numbers, cell phone numbers, and email addresses. Use the **Up** and **Down** arrows to scroll through a long list of customers.

To print the customer contact information, select **Print Report**.

NOTE: Misuse of personal contact information is illegal and will be prosecuted.

To open the customer list in Excel, select **Export Report To Excel**.

To email the report, select **Email Report as Attachment**. Refer to the "Email Report" section in this Manager Manual for more information on emailing reports.

When you have finished viewing the customer contacts, select **Close Report**.

Send Email Newsletter

You can easily add a customer's email address on the *New Customer* screen of the front end of PointOS. With customers' email addresses, you can send an HTML newsletter. Using the send newsletter feature of PointOS is an easy way to increase your sales, by staying in touch with your customers. Let them know your entertainment schedule, news, specials, or other information.

The *Send Newsletter* screen allows you to write, format, and send an html newsletter to your customers.

To open the *Send Newsletter* screen, select **Send Newsletter** from the **Activities** menu.

The system displays the *Send Newsletter* screen.

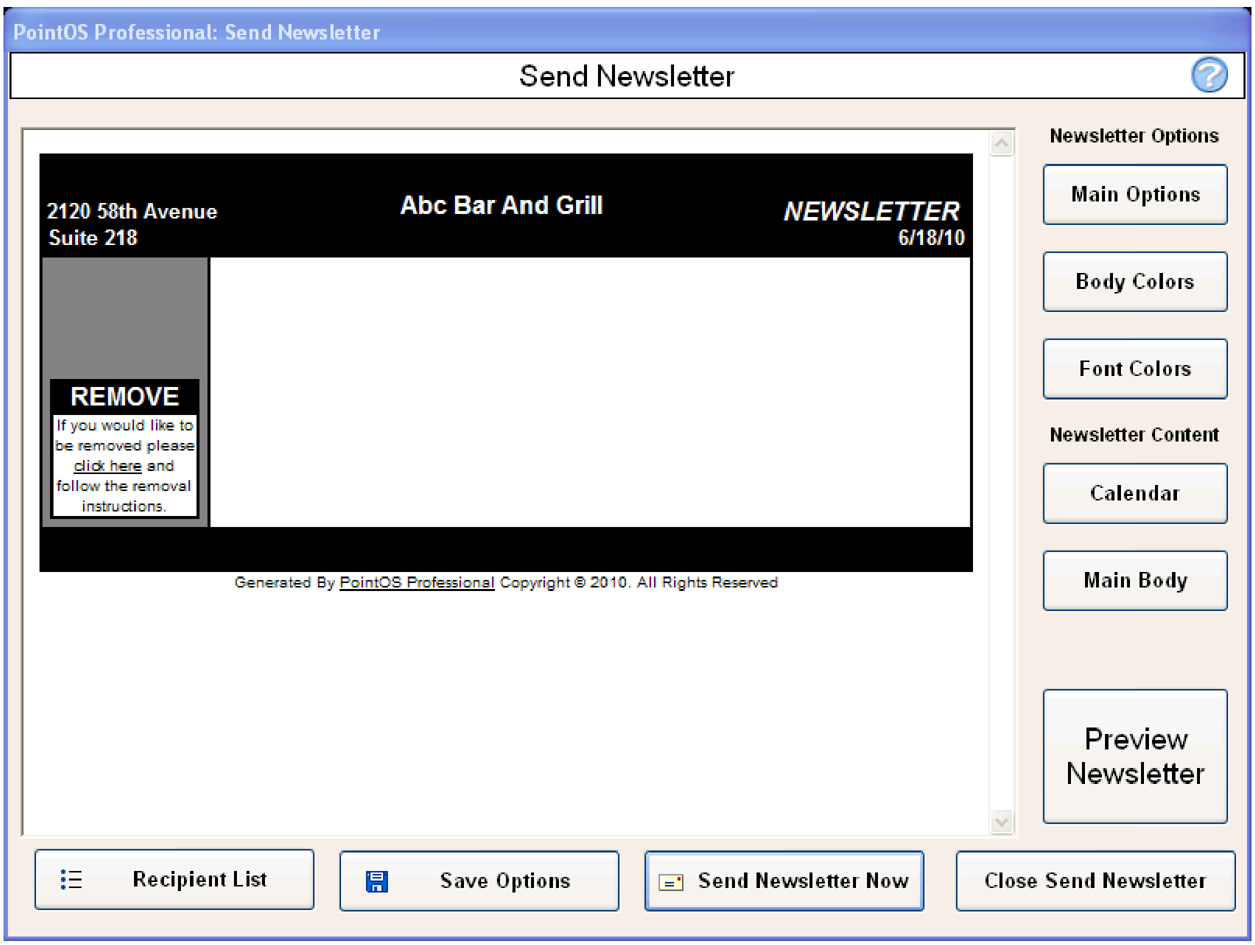


Figure 95: Send Newsletter Screen

You can preview your newsletter from any newsletter screen by selecting **Preview Newsletter**.

Overview of Newsletter

You can save a template for your newsletters to use the same options and colors every time you send a newsletter. Once you have set the look of the newsletter, you save those options. Then you can add content, including a preset entertainment calendar, for a specific newsletter. After creating your content, you select the recipients to receive the newsletter. Then you can send the newsletter.

Before you can send newsletters, make sure you have set your SMTP address on the *Email Setup* screen. Refer to the "Email Setup" section in this Manager Manual for more information.

Main Options

You will need to set your *Main Newsletter Options* first. These include the name of your company, address, logo, etc.

To open the *Main Newsletter Options*, go to the *Send Newsletter* screen and select **Main Options**.

The system displays the *Main Newsletter Options* screen.

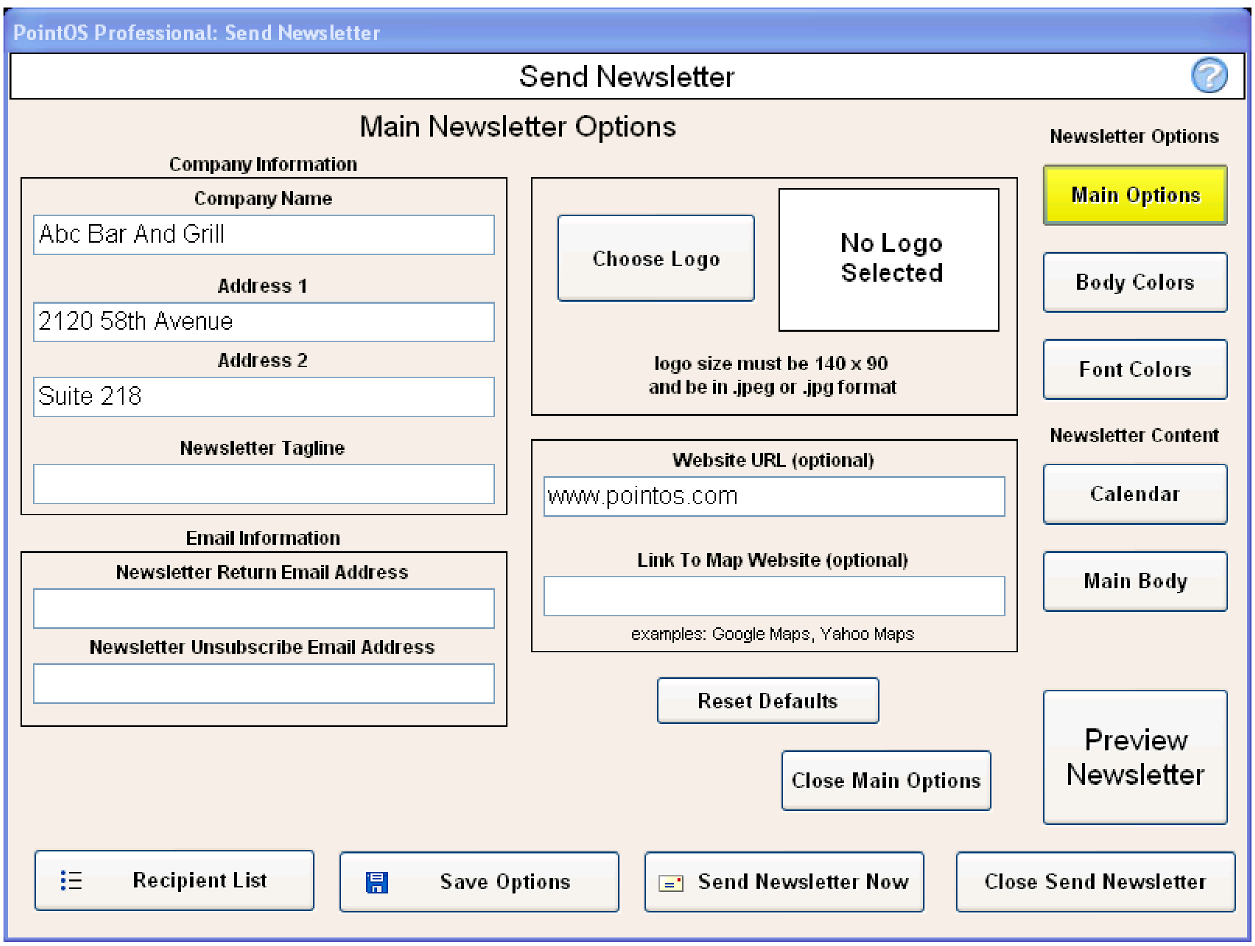


Figure 96: Main Newsletter Options

The system displays the **Company Information** stored in PointOS.

1. If you wish your **Company Information** to appear differently on your newsletter, you can change it:
   - Update the **Company Name**.
   - Update the **Address** (line 1 and 2).
2. Enter a **Newsletter Tagline**, which will appear at the bottom of the newsletter. You may wish to use your company slogan.
3. Customers will be able to see the email addresses on your newsletter, so you may not want to use the same address that you use for reporting. To change the addresses:
   - Update the return email address for customer email comments in the **Newsletter Return Email Address**.
   - Update the customer unsubscribe email address to allow customers on your list to unsubscribe from your newsletter in the **Newsletter Unsubscribe Email Address**.
4. To include a company logo on the newsletter, complete the following steps:
   - Make sure you have saved your graphic in jpg format with an image size of 140 x 90 in the Backgrounds folder of your database.
   - Select **Choose Logo**.
   - The system displays an alert notifying you to make sure your graphic is in the right format and in the correct location. Select **OK**.
   - The system opens the *Choose Newsletter Logo Graphic* dialog box, open to the correct location. Choose your graphic and select **Open** or select **Cancel** to return to the *Main Newsletter Options* screen.
5. The system displays the selected logo on the *Main Newsletter Options* screen.
6. If you want to include a link to your website on the newsletter, enter the Website URL.
7. If you want to include a link to a map on the newsletter, complete the following steps:
   - Find your location using a map service like Google or Yahoo.
   - Copy the address link into the **Link to Map Website** field of the *Main Newsletter Options* screen.
8. To reset the Main Options to the defaults, select **Reset Defaults**.
9. When you have finished selecting the Main Options, select **Close Main Options**.

Body Colors

Next, you can select the look for your newsletter by selecting the body colors.

To open the *Newsletter Body Colors*, go to the *Send Newsletter* screen and select **Body Colors**.

The system displays the *Newsletter Body Colors* screen.

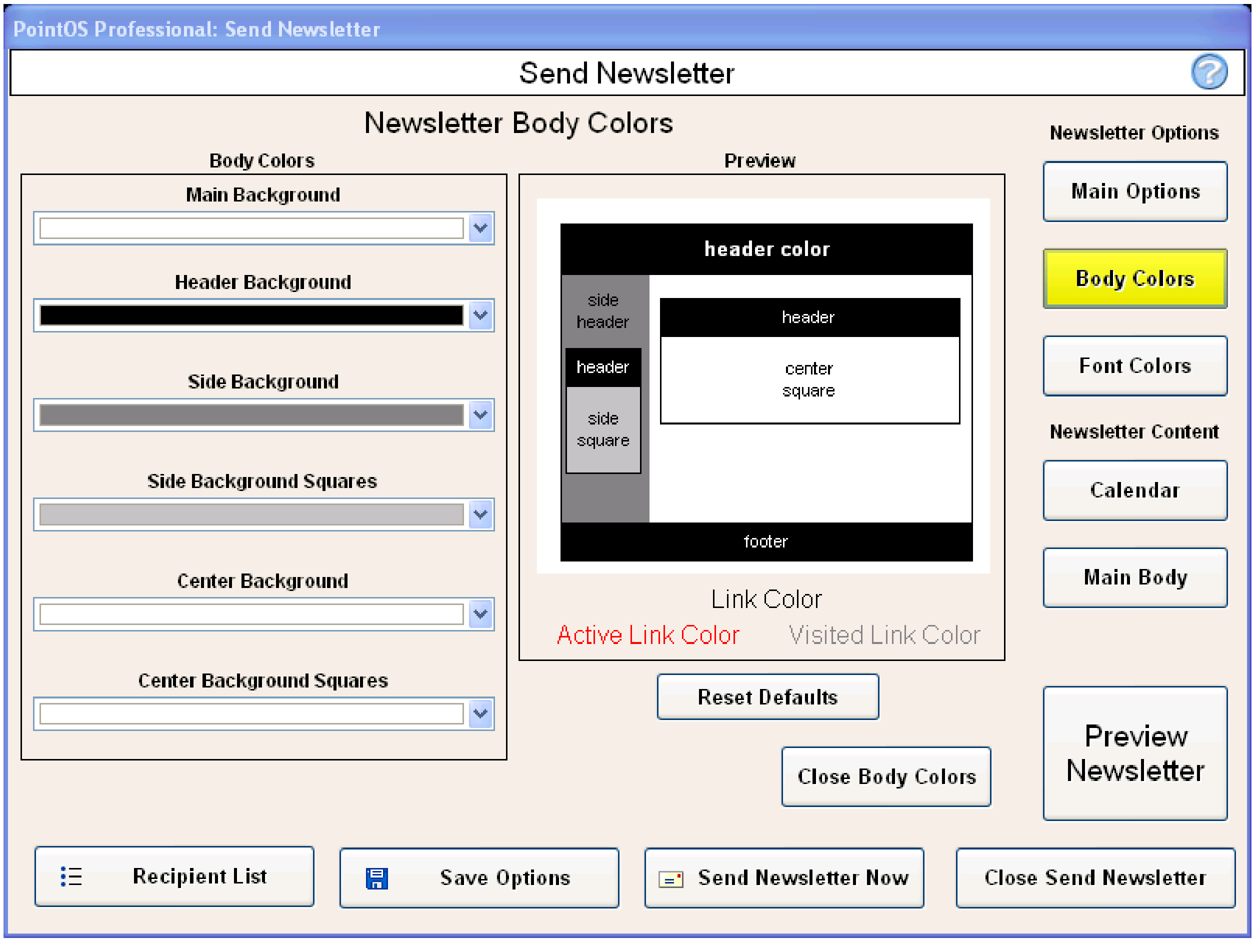


Figure 97: Newsletter Body Colors Screen

Use the drop down arrows to select a color choice for each option. The **Preview** area shows how the newsletter colors will appear.

To reset the colors to the defaults, select **Reset Defaults**.

When you have finished selecting the Body Colors, select **Close Body Colors**.

Font Options

Next, you can continue refining the look for your newsletter by selecting the font colors.

To open the *Newsletter Font Colors*, go to the *Send Newsletter* screen and select **Font Colors**.

The system displays the *Newsletter Font Colors* screen.

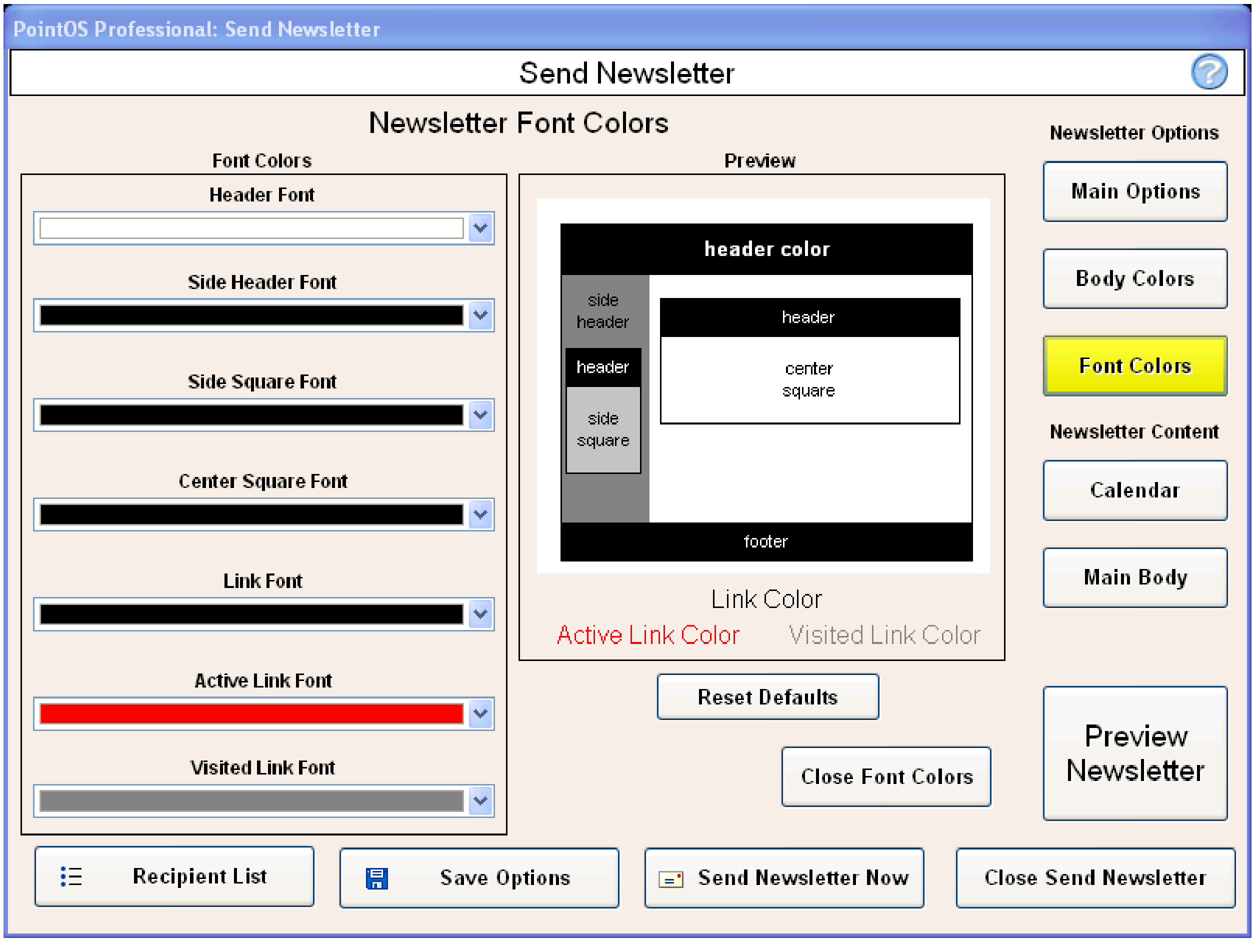


Figure 98: Newsletter Font Colors Screen

Use the drop down arrows to select a color choice for each option. The **Preview** area shows how the newsletter colors will appear.

To reset the colors to the defaults, select **Reset Defaults**.

When you have finished selecting the Font Colors, select **Close Font Colors**.

Save Options

After you have set your **Main Options**, your **Body Colors**, and your **Font Colors** for the newsletter, select **Save Options** to keep your selections for future newsletters.

NOTE: The Calendar and Main Body content cannot be saved using the **Save Options** button.

Calendar

Use the **Calendar** feature to add your **Entertainment Schedule** and a **Specials Calendar** to your newsletter. Make sure you have completed your Entertainment Schedule for the week you want to include in the newsletter first. Refer to the "Calendar" section in this Manager Manual for more information.

To open the *Newsletter Calendar*, go to the *Send Newsletter* screen and select **Calendar**.

The system displays the *Newsletter Calendar* screen.

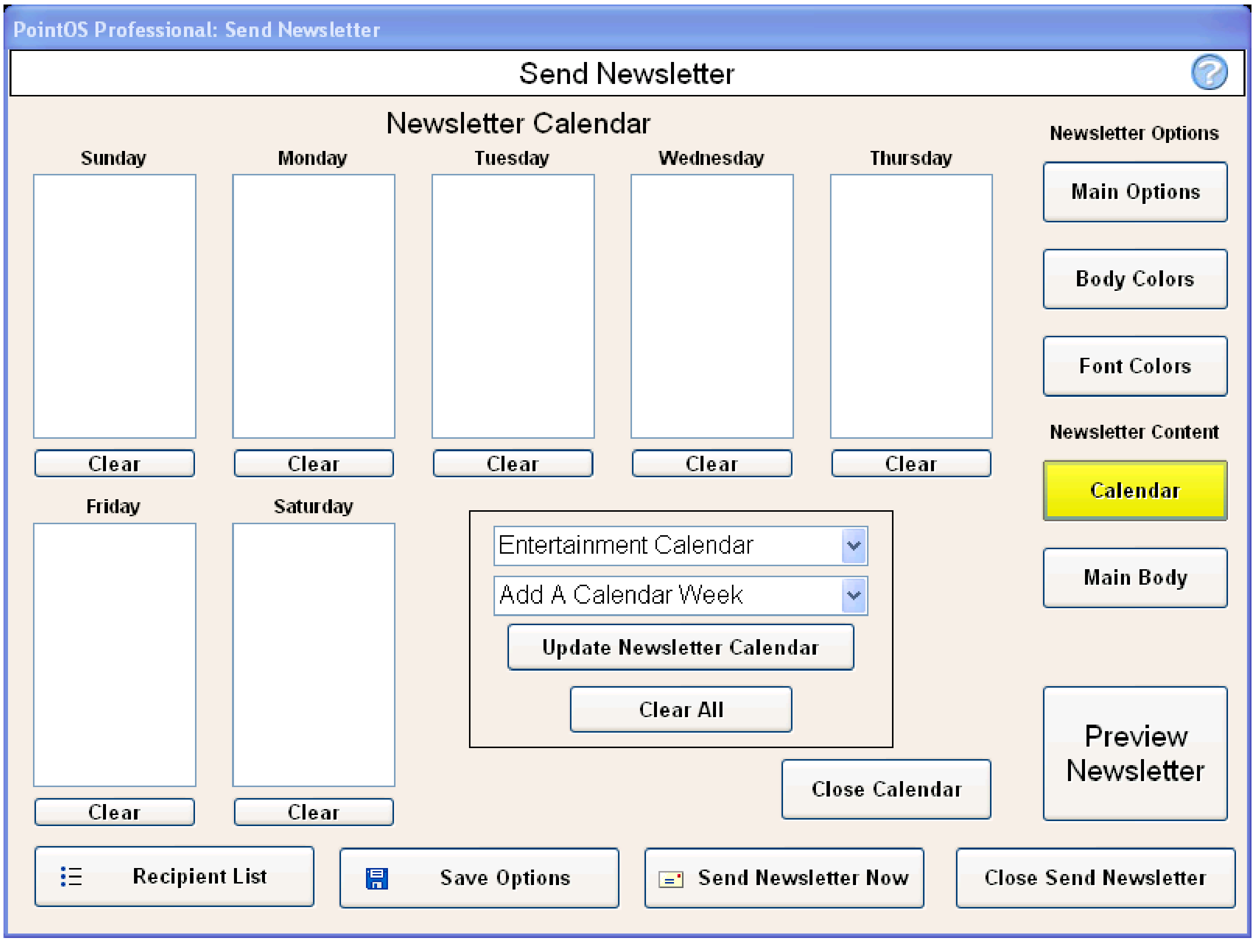


Figure 99: Newsletter Calendar Screen

To add details to your calendar, complete the following steps:

1. Choose either **Entertainment Calendar** or **Specials Calendar** from the drop down list.
2. Select a week to include in the newsletter from the **Add A Calendar Week** drop down list.
3. Select **Update Newsletter Calendar** to add the entire selected schedule for the selected week to the newsletter.

To manually enter items to the calendar, enter the desired text under that day.

To clear a selected day from the calendar, select **Clear** under that day. To clear the entire calendar, select **Clear All**.

When you have finished updating the entertainment schedule calendar, select **Close Calendar**.

Main Body

Use the **Main Body** feature to write your newsletter content.

To open the *Newsletter Content*, go to the *Send Newsletter* screen and select **Main Body**.

The system displays the *Newsletter Content* screen.

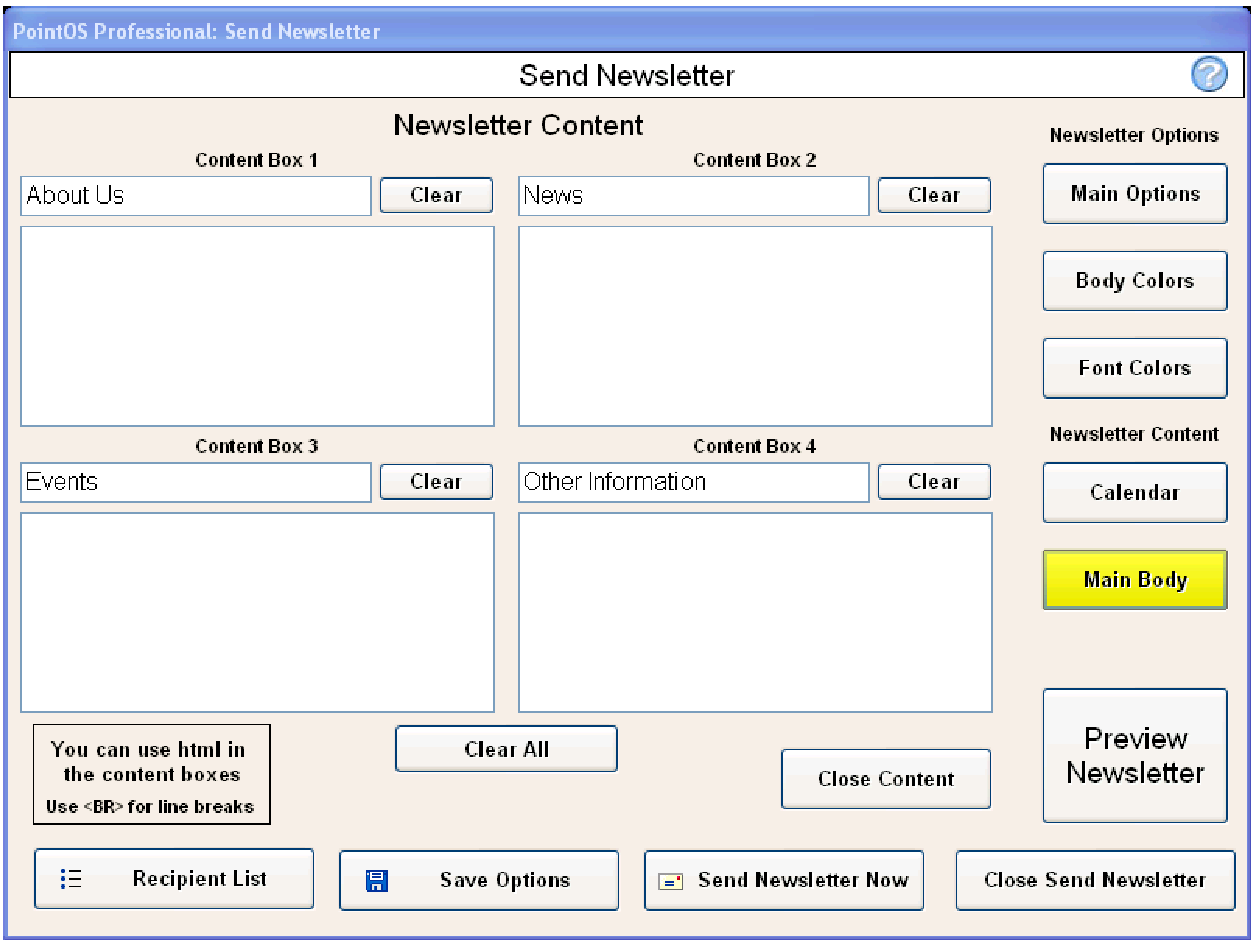


Figure 100: Newsletter Content Screen

There are four boxes available for the newsletter.

You can use the default header names of “About Us,” “News,” “Events,” and “Other Information,” or you can give each header a custom name by replacing the name with new text.

For each box, enter the text in the content box. You can use html coding to enhance your content, including links to websites or graphics (must be posted on the web). Use
 for line breaks. Select **Clear** from each box to remove the text from that box.

Select **Clear All** to remove all text from content boxes.

When you have finished updating the content, select **Close Content**.

Send to Recipients

Use the **Recipient List** feature to manage your customer email list.

To open the *Choose Newsletter Recipients*, go to the *Send Newsletter* screen and select **Recipient List**.

The system displays the *Choose Newsletter Recipients* screen.

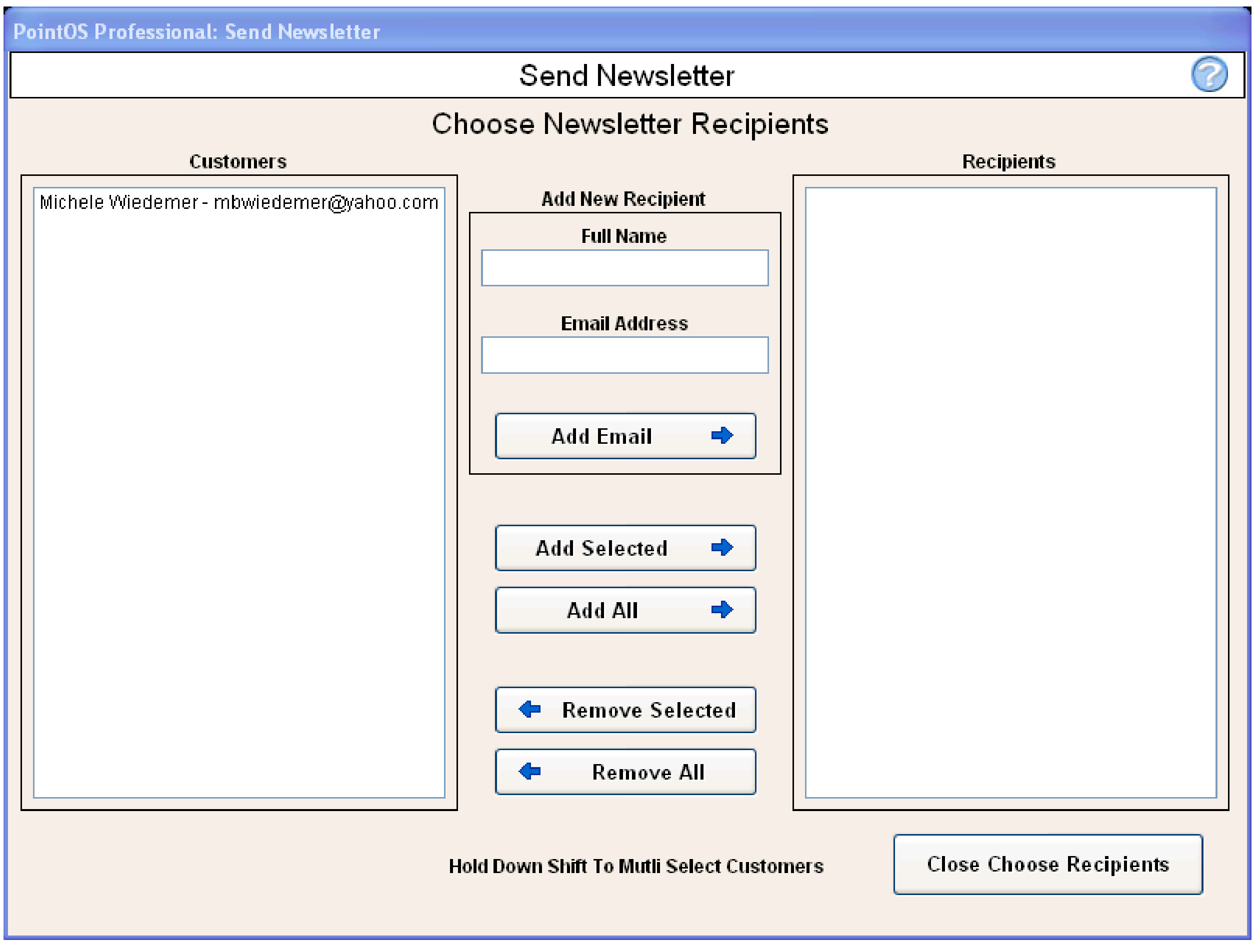


Figure 101: Choose Newsletter Recipients Screen

The left side lists your customer names and email addresses.

To add customers individually to the newsletter recipient list, highlight the customer name in the **Customers** area. You can hold down the SHIFT or CTRL keys to select more than one customer. Select **Add Selected**. To remove one or more customers from the newsletter recipient list, highlight the customer name(s) in the Recipients area and select **Remove Selected**.

NOTE: Customers who have unsubscribed will not appear on this list.

To add all customers to the newsletter recipient list, select **Add All**. To remove all customers from the newsletter recipient list, select **Remove All**.

To manually add a customer email address that does not appear in the **Customers** area, complete the following steps:

1. Enter the customer's **Full Name**.
2. Enter the customer's **Email Address**.
3. Select **Add Email**.

When you have finished selecting the newsletter recipients, select **Close Choose Recipients**.

Select **Send Newsletter Now** on the *Send Newsletter* screen to send the newsletter to the selected recipients.

Unsubscribe Newsletter Customers

The *Unsubscribe Newsletter Customers* screen allows you to subscribe or unsubscribe your customers to your HTML newsletter. *Email Settings* must be correctly setup for this to work. Refer to the "Email Setup" section in this Manager Manual for more information.

To open the *Unsubscribe Newsletter Customers* screen, select **Unsubscribe Customers** from the **Activities** menu.

The system displays the *Unsubscribe Newsletter Customers* screen.

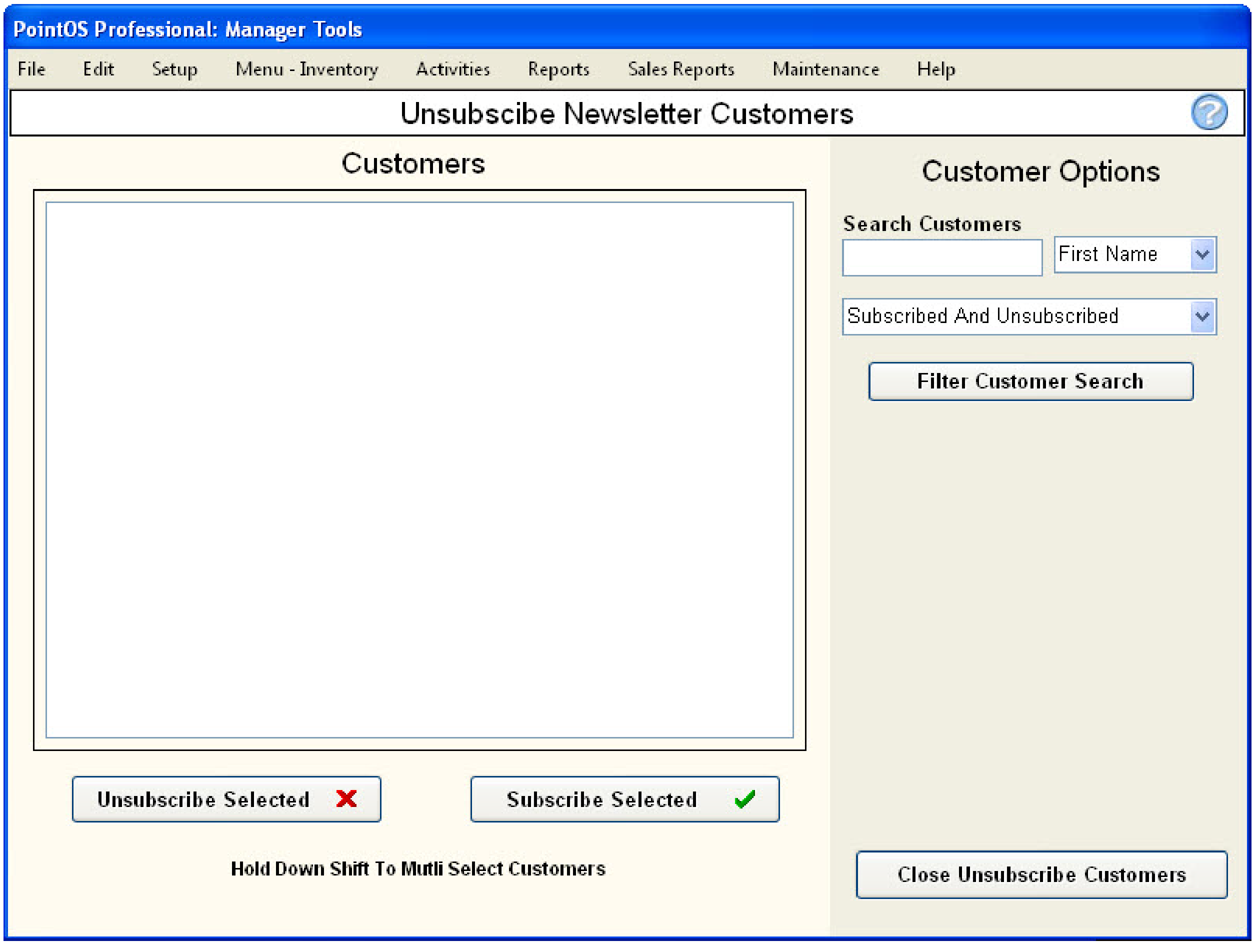


Figure 102: Unsubscribe Newsletter Customers Screen

Find Customer

The **Customers** area lists the customers in your system for whom you have email addresses.

To find a specific customer, use the **Customer Options**.

1. Enter one or more letters of the customer's name in the **Search Customers** field and select which name it is from the drop down list.
2. To filter the list of names, select an option from the **Unsubscribed Customers** drop down list.
3. Select **Filter Customer Search**. The system displays the customers that match your search criteria in the **Customers** area.

Subscribe or Unsubscribe Customer

Highlight the customer whose subscription status you want to change in the **Customers** area. To select more than one customer, hold down the Shift key while selecting the customers.

To unsubscribe the selected customers from the email newsletter list, select **Unsubscribe Selected**. To add the selected customers to the email newsletter list, select **Subscribe Selected**.

Close Unsubscribe Customers

When you have finished working with customer newsletter subscriptions, select **Close Unsubscribe Customers**.

Manage Memberships

NOTE: This screen is only available if you are using PointOS DoorMan as one of your licensed stations.

The *Manage Memberships* screen allows you to manage your customer memberships.

To open the *Manage Memberships* screen, select **Manage Memberships** from the **Activities** menu.

The system displays the *Manage Memberships* screen.

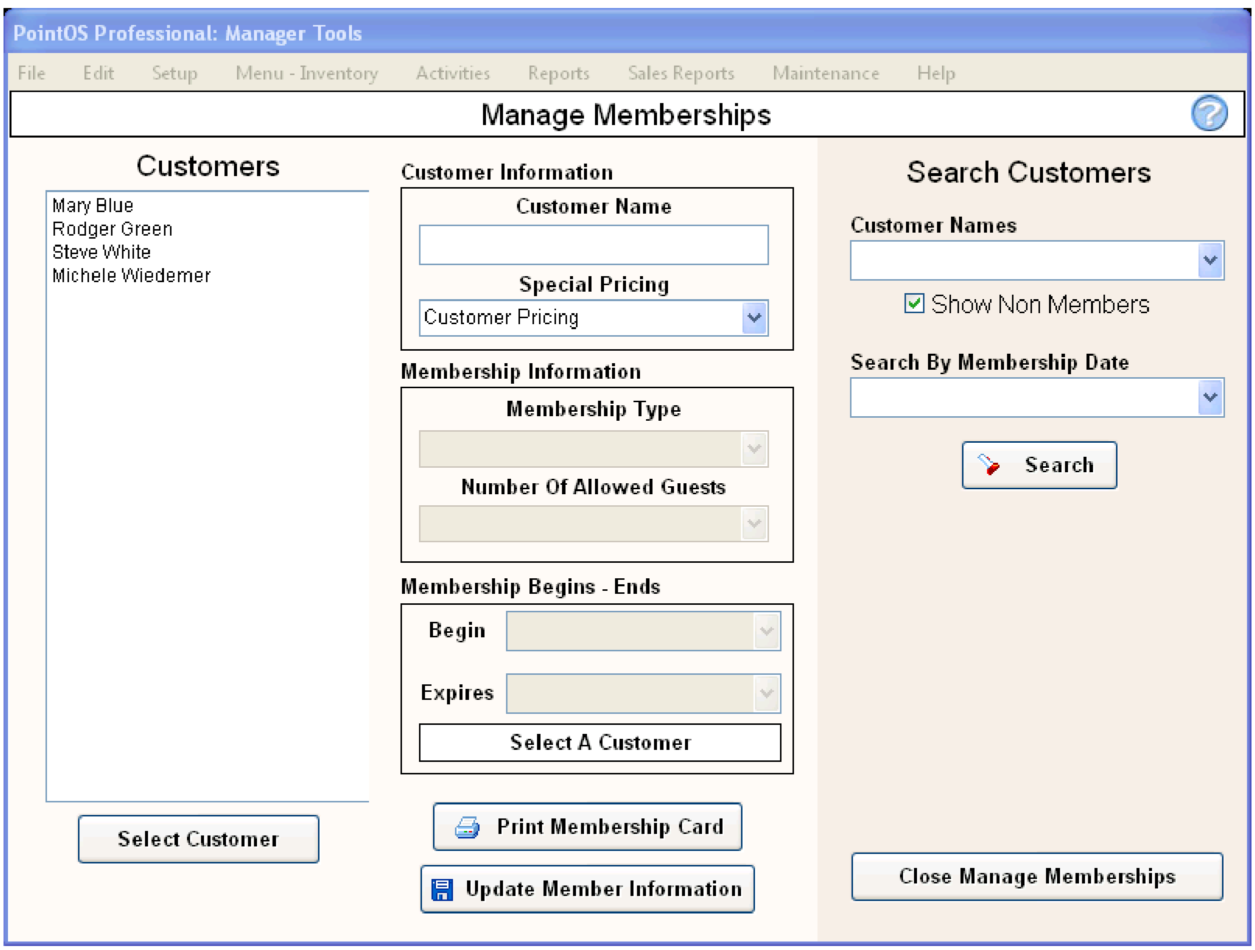


Figure 103: Manage Memberships Screen

Find Customer

The **Customers** area lists the customers in your system.

To find a specific customer, use the **Search Customers**.

1. Select the **Customer Name** from the drop down list.
2. Check the **Show Non Members** box to include all customers in the list.
3. To search by **Membership Date**, select the drop down arrow to choose the date from the calendar.
4. Select **Search**. The system displays the customers that match your search criteria in the **Customers** area.

Update Membership Information

To update the membership information, complete the following steps:

1. Highlight the customer you want to update in the **Customers** area.
2. Choose **Select Customer**.

The **Customer Information** area displays the membership information for that customer, including a notation if the customer is not a member.

3. To change the membership type or create a membership for the selected customer, select a **Membership Type** from the drop down list. If you are creating a new membership, the system displays a warning to verify you want to create a new membership. Select **Yes** to continue, or **No** to close the warning without creating a new membership.
4. To set special pricing for the selected customer, select a **Special Pricing** option from the drop down list.
5. Select the **Number of Allowed Guests** from the drop down list.
6. Enter the **Membership Begin Date**. You can use the drop down list to select the date from the calendar.
7. Enter the **Membership End Date**. You can use the drop down list to select the date from the calendar.
8. Select **Update Membership Information** to save the changes.

Print Membership Card

NOTE: To print membership cards, you must have a compatible ID card printer.

1. Highlight the customer for whom you want to print a membership card in the **Customers** area.
2. Choose **Select Customer**.
3. Select **Print Membership Card**.

The system displays the *Print Membership Card* screen.

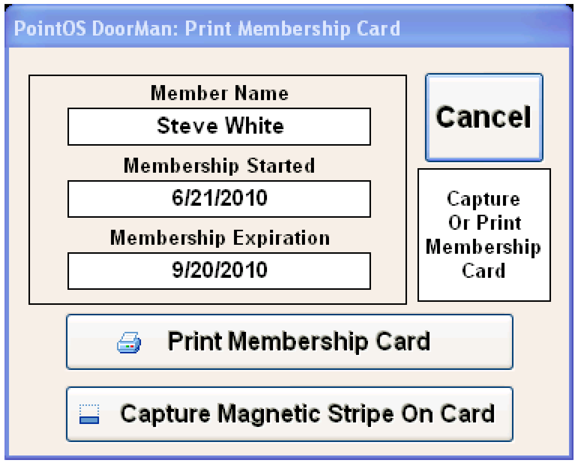


Figure 104: Print Membership Card Screen

To print the card, select **Print Membership Card**. Or **Cancel** to close the screen without printing the card.

To capture the magnetic stripe on the card, complete the following steps:

1. Select **Capture Magnetic Stripe On Card** to open the Add ID Card screen.

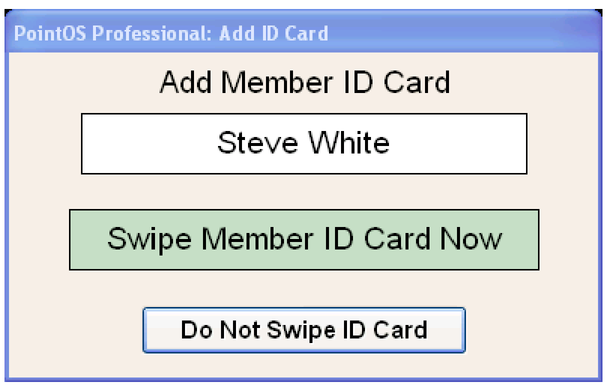


Figure 105: Add ID Card Screen

2. Swipe the card.

Close Manage Memberships

When you have finished working with memberships, select **Close Manage Memberships**.

Calendar

The *Calendar* screen allows you to set up the weekly entertainment schedule and the weekly specials calendar. Employees can view (or print for customers) this schedule from the *Time Card* area.

To open the *Calendar* screen, select **Calendar** from the **Activities** menu.

The system displays the *Calendar* screen.

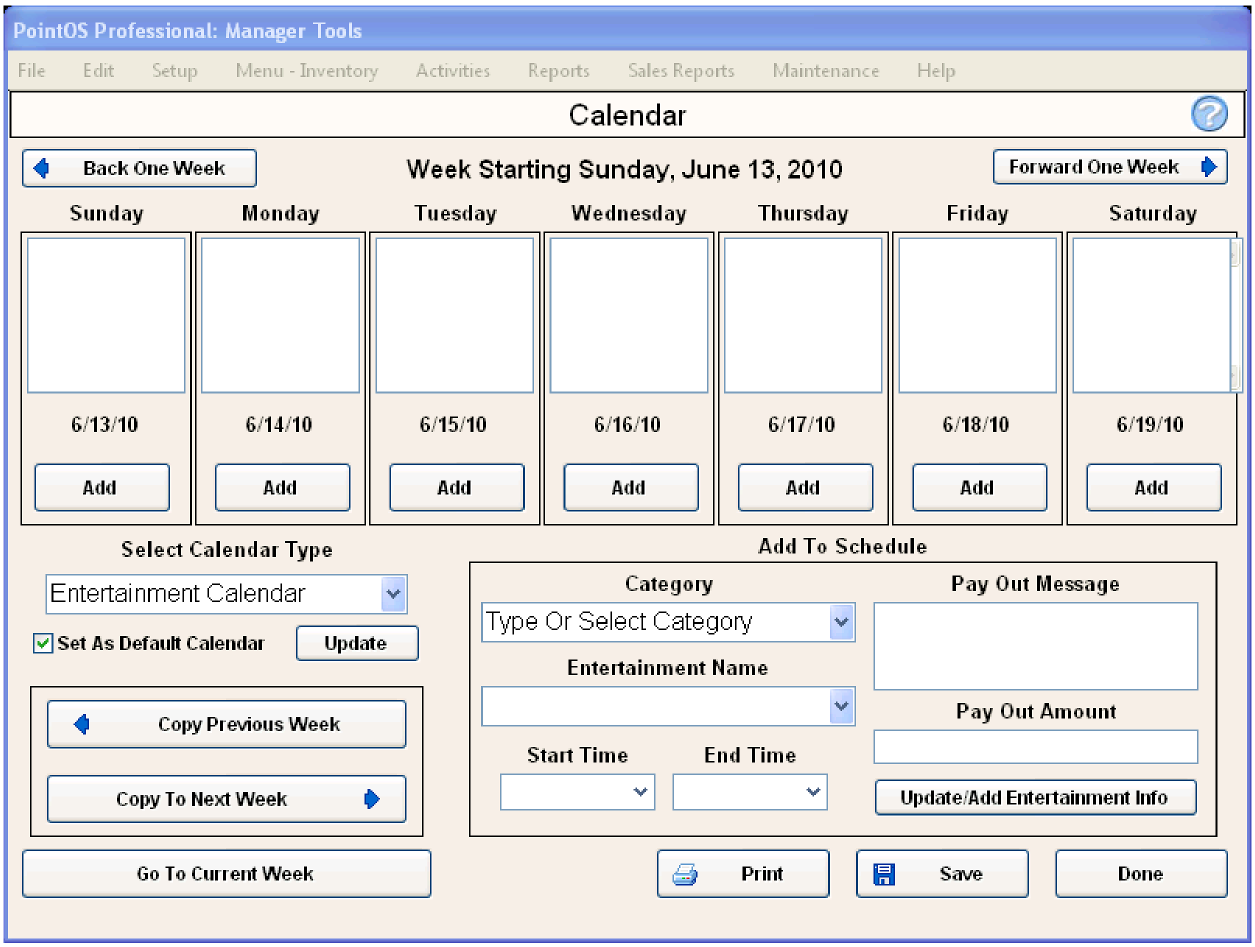


Figure 106: Calendar Screen

Navigate the Calendar

Select **Back One Week** to go to the previous week's schedule.

Select **Forward One Week** to go to the next week's schedule.

Select **Go To Current Week** to return to the schedule for the current week.

Create an Entertainment Calendar

Complete the following steps to create an entertainment calendar.

1. Make sure that **Entertainment Calendar** is selected from the **Calendar Type** drop down list.
2. Select the category from the **Category** drop down list or create a new category by entering the name.
3. Select the entertainment name from the **Entertainment Name** drop down list or create a new item in the selected category by entering the name.
4. Select the starting time in the **Start Time** field.
5. Select the ending time in the **End Time** field.
6. To include a payout message for this entertainment, enter the message in the **Pay Out Message** field.
7. To indicate the payout amount for this entertainment, enter the amount in the **Pay Out Amount** field.
8. Select **Update Entertainment Info** to save the entertainment.
9. Select **Add** on the day(s) to add that entertainment at the selected time.
10. Repeat for multiple days, selecting a new **Start Time** and **End Time** for different days as necessary.
11. Repeat for all of the entertainment you have scheduled for the week.
12. Select **Save** to save the schedule information. Select **Print** to print the schedule information.

You can also speed scheduling up by copying a schedule.

1. Select **Copy Previous Week** to copy the previous week's schedule to the current week.
2. Select **Copy To Next Week** to copy the current schedule to the next week.

Create Specials Calendar

Select **Specials Calendar** from the **Calendar Type** drop down list.

The system displays the *Specials Calendar*.

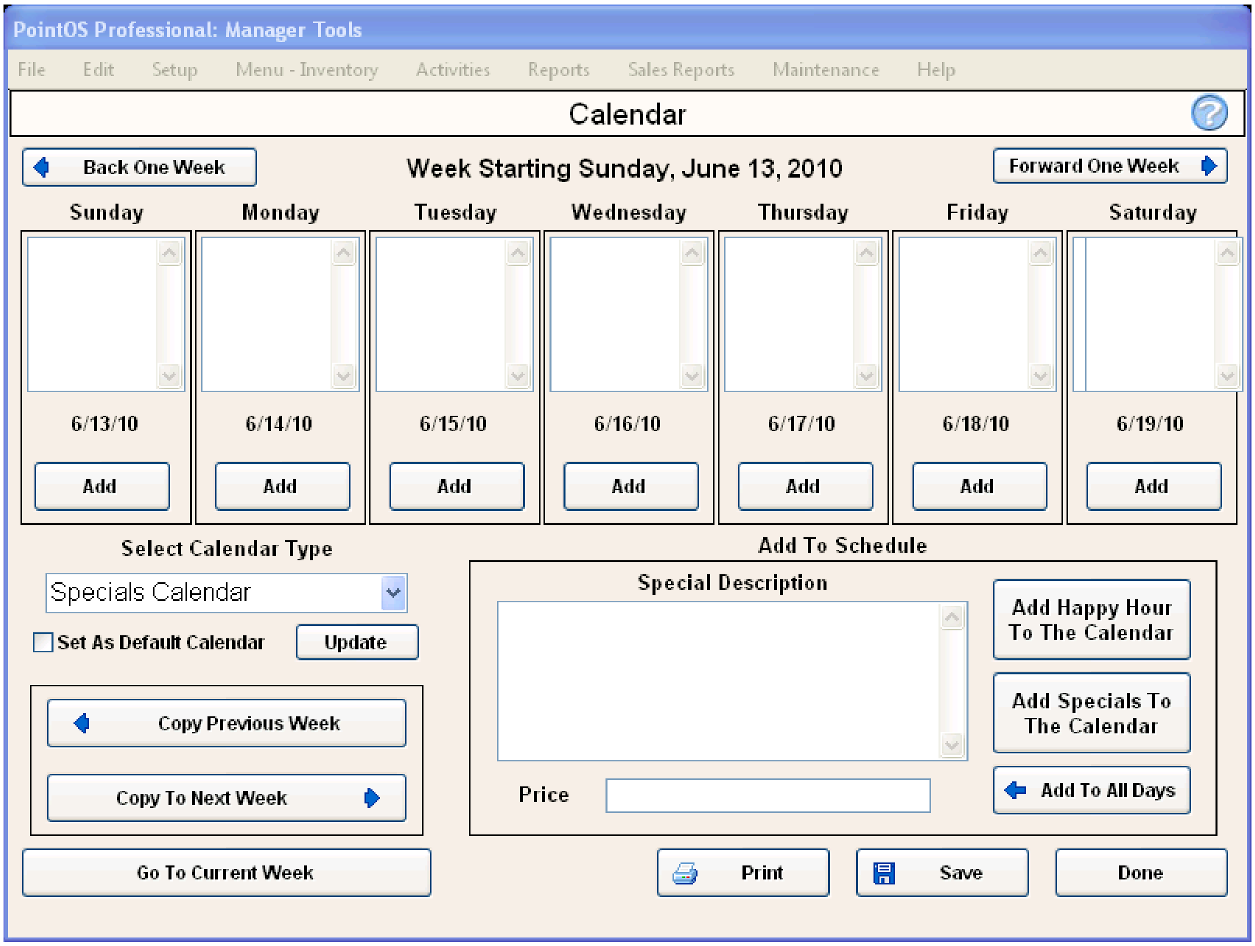


Figure 107: Specials Calendar

To add all the Happy Hour specials to the calendar, select **Add Happy Hour to the Calendar**. Refer to the "Happy Hour Setup" section in this Manager Manual for more information.

To add all of the Specials to the calendar, select **Add Specials to the Calendar**. Refer to the "Special Pricing" section in this Manager Manual for more information.

To add specials on the fly, complete the following steps:

1. Enter the **Special Description**.
2. Enter the **Price**.
3. Select **Add** on the day(s) to add that special to the selected day. Or select **Add to All Days** to add that special to all days.

4. Repeat for all of the specials you want to add for the week.
5. Select **Save** to save the schedule information. Select **Print** to print the schedule information.

You can also speed scheduling up by copying a schedule.

1. Select **Copy Previous Week** to copy the previous week's schedule to the current week.
2. Select **Copy To Next Week** to copy the current schedule to the next week.

Close the Calendar

When you have finished creating the employee schedule, select **Done**.

View Song List

The *View Song List* screen allows you to view a list of all songs in your database. This list can be printed or exported to several different formats.

To open the *View Song List* screen, select **View Song List** from the **Activities** menu.

The system displays the *View Song List* screen.

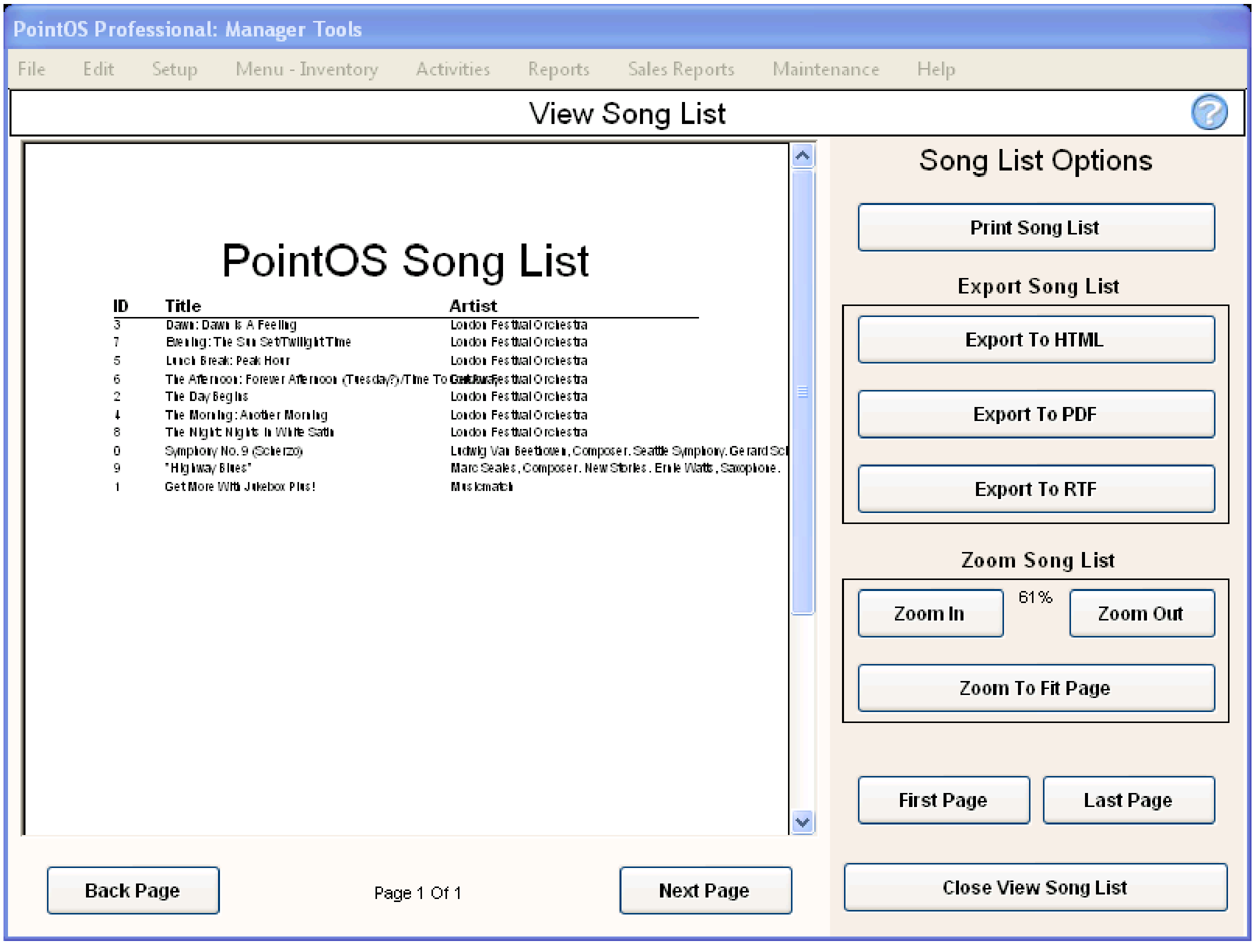


Figure 108: View Song List Screen

PointOS List

The left side of the screen shows the song list. You can use the **Back Page** and **Next Page** arrows to navigate through several pages of your song list. Select **First Page** to go to the first page of the list. Select **Last Page** to go to the last page of the list.

To print the song list, select **Print Song List**. You must have set up your report printer. Refer to "Setup Additional Printers" section in this Manager Manual for more information.

To change the view of the song list, you can use the Zoom features:

- Select **Zoom In** one or more times to enlarge the view of the song list.
- Select **Zoom Out** one or more times to reduce the view of the song list.
- Select **Zoom to Fit Page** to return the view of the song list to one page width.

Export Song List

You can export your song list to three different formats:

- To open the song list in HTML (in your default web browser), select **Export to HTML**.
- To open the song list in Adobe PDF©, select **Export to PDF**.
- To open the song list in your default word processor in the RTF format, select **Export to RTF**.

Close Song List

When you have finished viewing the customer list, select **Close View Song List**.

Manage Payouts

Pay outs are the system's way of keeping track of the amount of money you should have on hand after you have paid someone cash. Pay outs can be done in two ways: by a manager in the back end, or by a manager or server from a cash drawer.

The *Manage Pay Outs* screen allows you to create, manage, change, or void pay outs made in the system. Unlike the *Delete Pay Out* area on the *Manager Dashboard*, you can edit pay outs from any drawer, even if it has been closed.

To open the *Manage Pay Outs* screen, select **Manage Pay Outs** from the **Activities** menu.

The system displays the *Manage Pay Outs* screen.

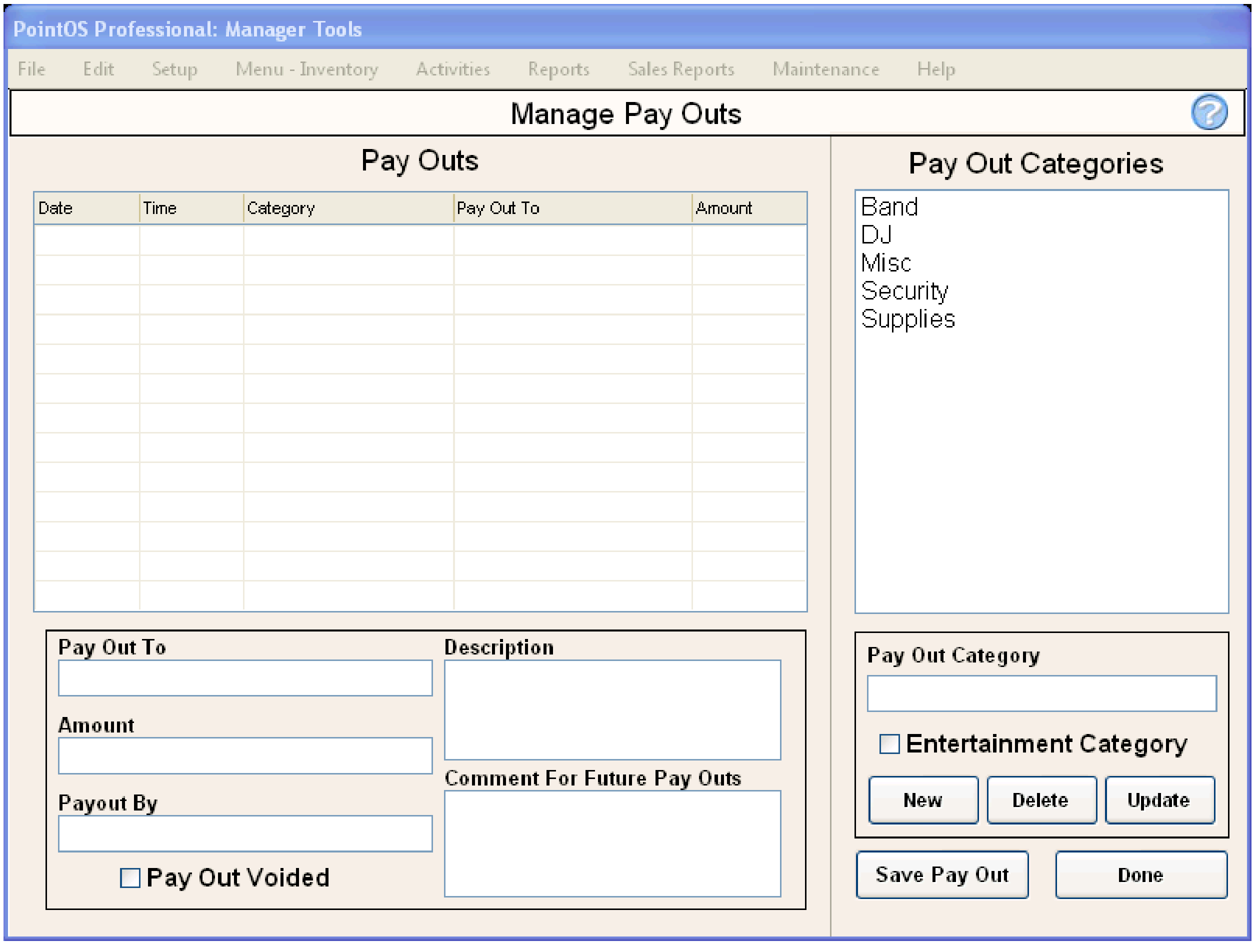


Figure 109: Manage Pay Outs Screen

Pay Outs

The *Pay Outs* area lists any pay outs that have been made. You can edit the payout description or comment for future pay outs to a selected payee. You can also void a payout made from any cash drawer.

1. Highlight the selected pay out in the **Pay Outs** area.
2. To edit the pay out, including a reason for voiding the pay out, update the **Description** or the **Comment for Future Pay Outs**. To void the pay out, check the **Pay Out Voided** box.
3. Select **Save Pay Out**.

The system displays three messages:

1. The system verifies that you want to save changes to the pay out. Select **Yes** to save or **No** to close the box without saving.

2. The system asks if you want to save the pay out to the Payees list for making future pay outs. Select **Yes** to include the item in the Payees list or **No** to close the box without including the item on the list.
3. The system verifies that the payout has been saved.

Pay Out Categories

Pay outs can be put into several different categories for the purpose of reporting and accounting. These categories appear on the front end Pay Out screen. Entertainment categories appear on the *Calendar* screen.

To create a payout category, complete the following steps:

1. Enter the category name in the **Pay Out Category** field. Check the **Entertainment Category** box if applicable.
2. Select **New**.
3. The system notifies you that the category is added. Select **OK** to close the dialog box.

To rename a payout category, complete the following steps:

1. Highlight the selected category in the **Pay Out Categories** list.
2. Update the name in the **Pay Out Category** field. Check the **Entertainment Category** box if applicable.
3. Select **Update**.

To delete a payout category, complete the following steps:

Highlight the selected category in the **Pay Out Categories** list.

1. Select **Delete**.
2. The system verifies that you want to save the payout category. Select **Yes** to save or **No** to close the box without saving.

Setting Up A Payout

You can set up a payout for future use. Complete the following steps:

1. Highlight the selected category in the **Pay Out Categories** list.
2. Enter the name in the **Pay Out To** field.
3. Enter the description in the **Description** field.
4. Enter more information in the **Comment for Future Pay Outs** field.
5. Select **Save Pay Out**.

The system verifies that you want to save the payout category.

6. Select **Yes** to save or **No** to close the box without saving.

Close Manage Pay Outs

When you have finished working with Pay Outs, select **Done**.

Batch Credit Cards

The *Batch Credit Card* screen allows you to manually batch credit cards and clear pre authorizations. Refer to the "Payment Setup" section in this Manager Manual for more information about automatically batching credit cards.

NOTE: If you are using pre-authorizations, you must clear the pre-authorizations through PointOS batching. If you batch from the Merchant Warehouse website without batching through PointOS, your pre-authorization customers will incur a $.01 charge.

To open the *Batch Credit Cards* screen, select **Batch Credit Cards** from the **Activities** menu.

The system displays the *Batch Credit Cards* screen and begins the process of batching credit cards.

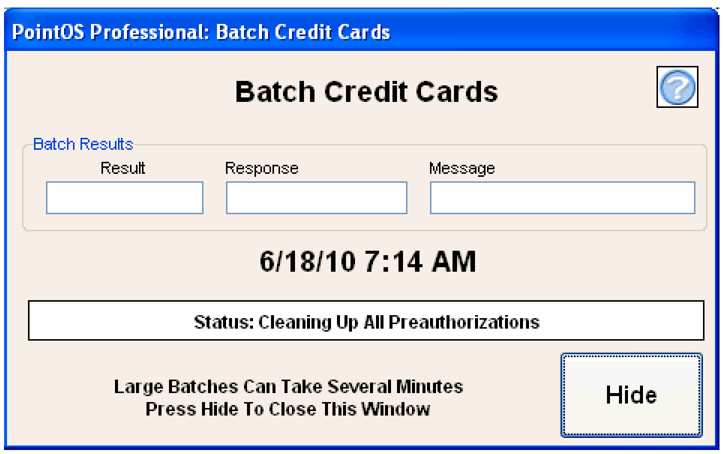


Figure 110: Batch Credit Cards

The system displays the Batch Results, Responses, Message, and current status of the batch.

To hide the *Batch Credit Cards* screen while it continues batching, select **Hide**.

Credit Card Refund

NOTE: This option is only available if you have credit cards enabled on your system.

The *Credit Card Refund* screen allows you to issue a refund to a customer's credit card.

To open the *Credit Card Refund* screen, select **Credit Card Refund** from the **Activities** menu.

The system displays the *Credit Card Refund* screen.

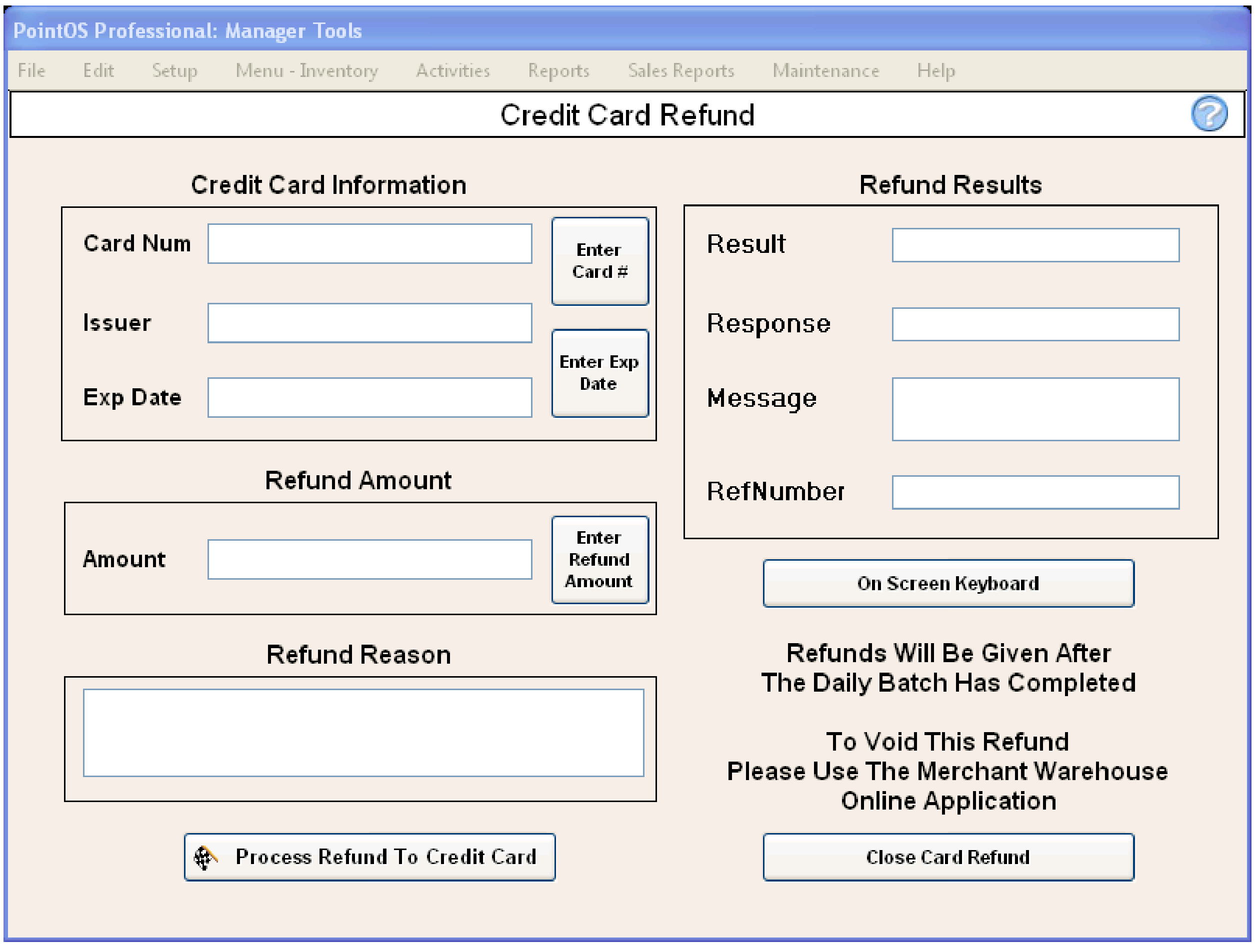


Figure 111: Credit Card Refund

Select **On Screen Keyboard** to display the on-screen keyboard.

To process a credit card refund, complete the following steps:

1. Enter the **Credit Card Information**:
   - Select **Enter Card** # to enter the Card Number.
   - Select **Enter Exp Date** to enter the Expiration Date.
2. Select **Enter Refund Amount** to enter the Amount.

3. Select **Process Refund to Credit Card**.

The **Refund Results** area displays the Result, Response, Message, and Reference Number for the refund.

NOTE: The refund will not be available until you batch your credit cards.

Close Credit Card Refund

When you have finished the refund, select **Close Card Refund**.

Merchant Warehouse

The *Merchant Warehouse* screen allows you to access the Merchant Warehouse online reporting website. From here you can also charge cards, add tips, and batch. However, any transactions made from here, will not be reflected in any of the PointOS reporting.

NOTE: This screen is only available if you have credit cards enabled on your system.

To open the *Merchant Warehouse* screen, select **Go To Merchant Warehouse** from the **Activities** menu.

The system displays the *Merchant Warehouse* screen.

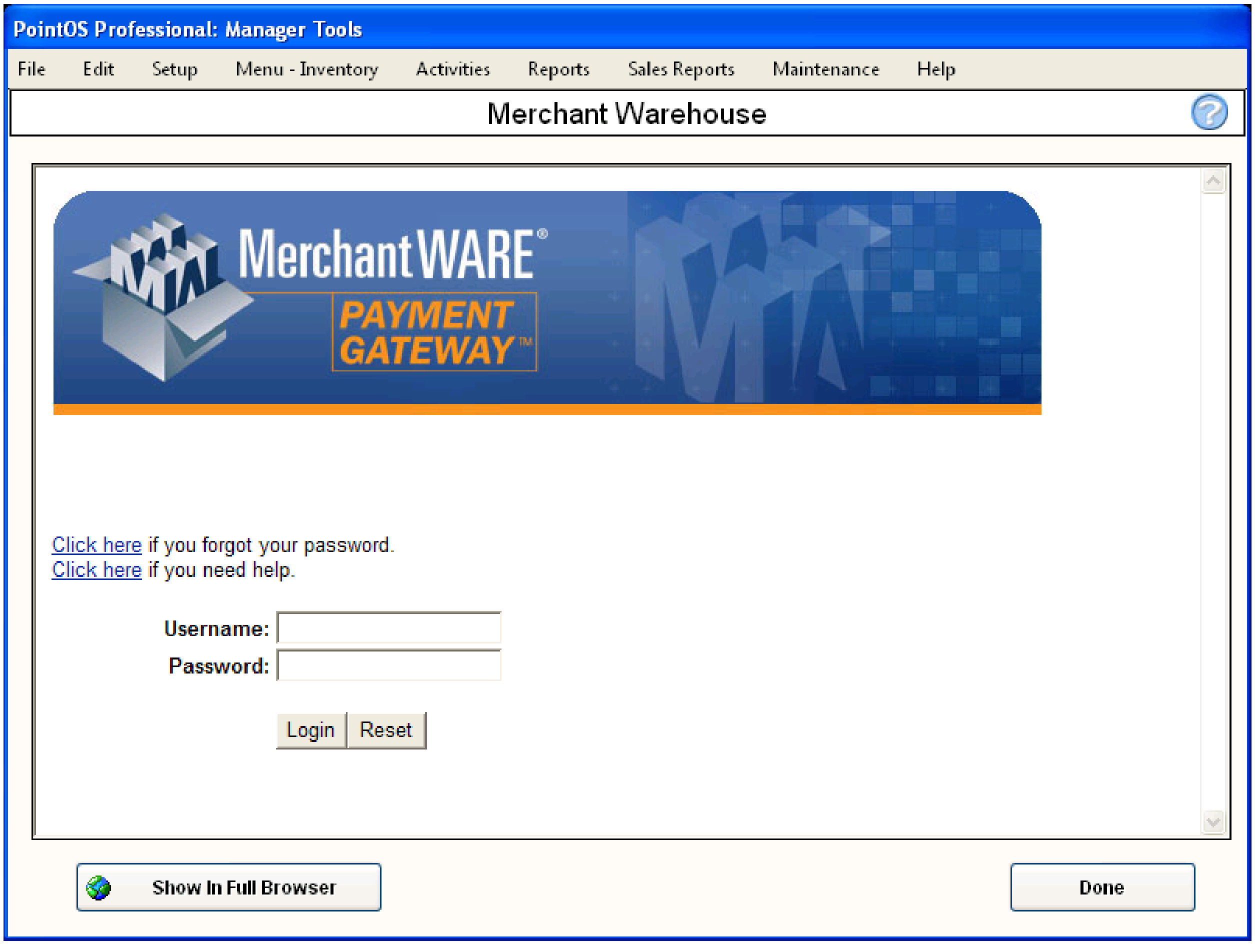


Figure 112: Merchant Warehouse Screen

Select **Show In Full Browser** to open the *Merchant Warehouse* website in your default web browser.

To access the Merchant Warehouse account, complete the following steps:

1. Enter your Merchant Warehouse user name in the **Username** field.
2. Enter your **Password**.
3. Select **Login**.
4. Select **Done** to close the website.

PointOS to QuickBooks©

NOTE: PointOS To QuickBooks is not compatible with QuickBooks POS, but it works with all other version of QuickBooks, including QuickBooks Pro. The PointOS To QuickBooks© screen allows you to send sales and payment data directly to QuickBooks©. This connection automatically creates accounts in QuickBooks©.

NOTE: You cannot rename these accounts. Do not modify these accounts in QuickBooks©.

These are the accounts created:

Account Name	Account Type	Parent Name
On Premise Cash	Bank	
Credit Card Refunds	Income	
Visa	Income	Credit Card Refunds
Master Card	Income	Credit Card Refunds
Discover	Income	Credit Card Refunds
American Express	Income	Credit Card Refunds
Main Bank Account	Bank	
Gift Cards Payable	Other Current Liability	
Visa	Bank	Main Bank Account
Master Card	Bank	Main Bank Account
Discover	Bank	Main Bank Account
American Express	Bank	Main Bank Account
Debit	Bank	Main Bank Account
Gift Cards Issued	Income	
Checks To Deposit	Bank	
Account Name	Account Type	Parent Name
POS Payouts	Expense	
Employee Tips Payable	Other Current Liability	
Pay Out Categories	Expense	POS Payouts
POS Sales	Income	

Account Name	Account Type	Parent Name
Sales Tax Payable	Other Current Liability	
Cash Drawer Discrepancies	Other Expense	

To open the *PointOS To QuickBooks©* screen, select **PointOS to QuickBooks©** from the **Activities** menu.

The system displays the *PointOS To QuickBooks©* screen.

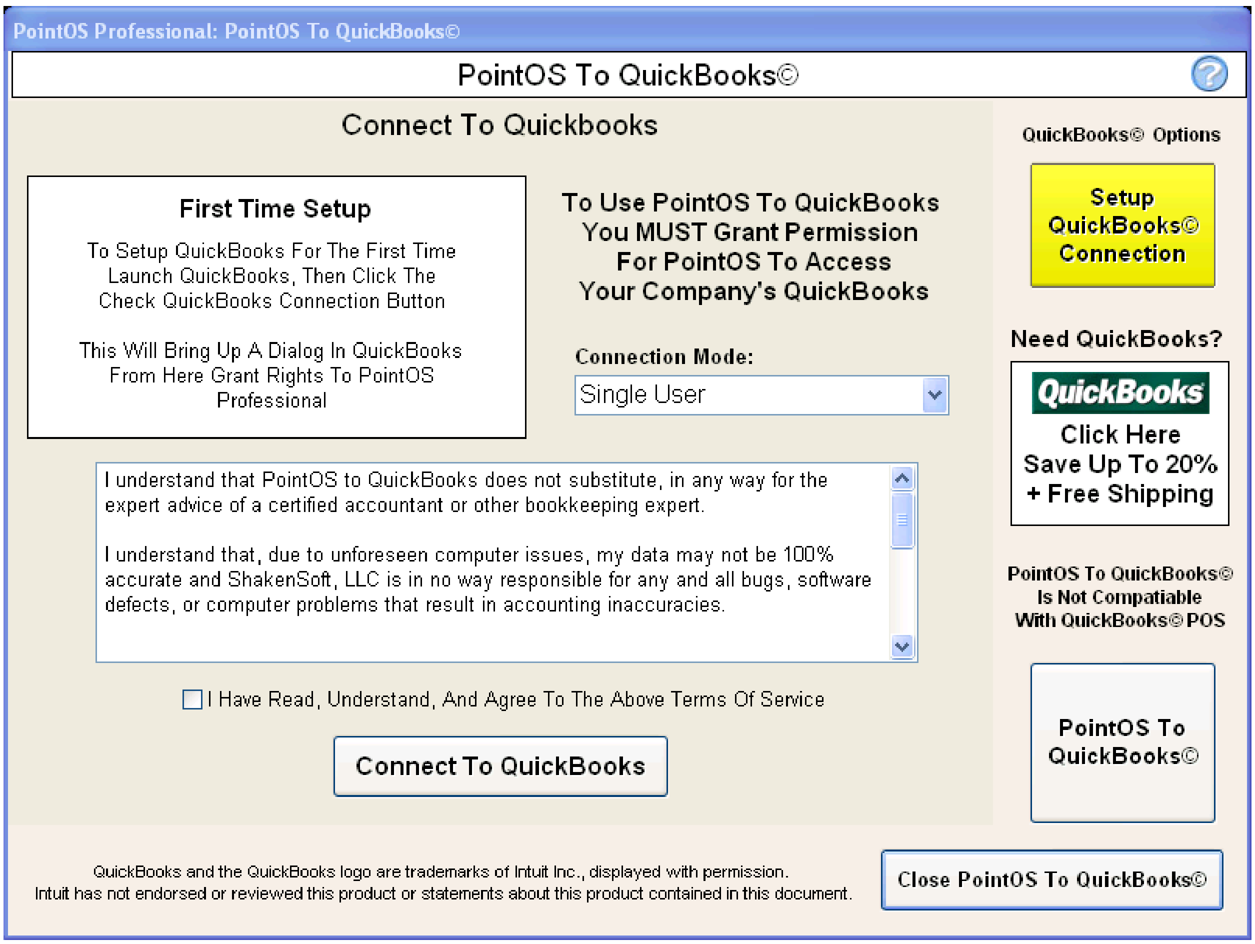


Figure 113: PointOS to QuickBooks©

To use the Connect to QuickBooks© feature, first launch QuickBooks© with your company file loaded.

To set up your connection, complete the following steps:

1. Read the **Terms of Service** and check the box indicating that you understand them.
2. Select the **Connection Mode** from the drop down list.
3. Select **Connect To QuickBooks©.**

4. **QuickBooks©** will prompt you to allow the connection from PointOS Professional. Select **Yes** to allow the connection.
5. Select **Setup QuickBooks©** Connection.

The system displays the *Send To QuickBooks©* screen.

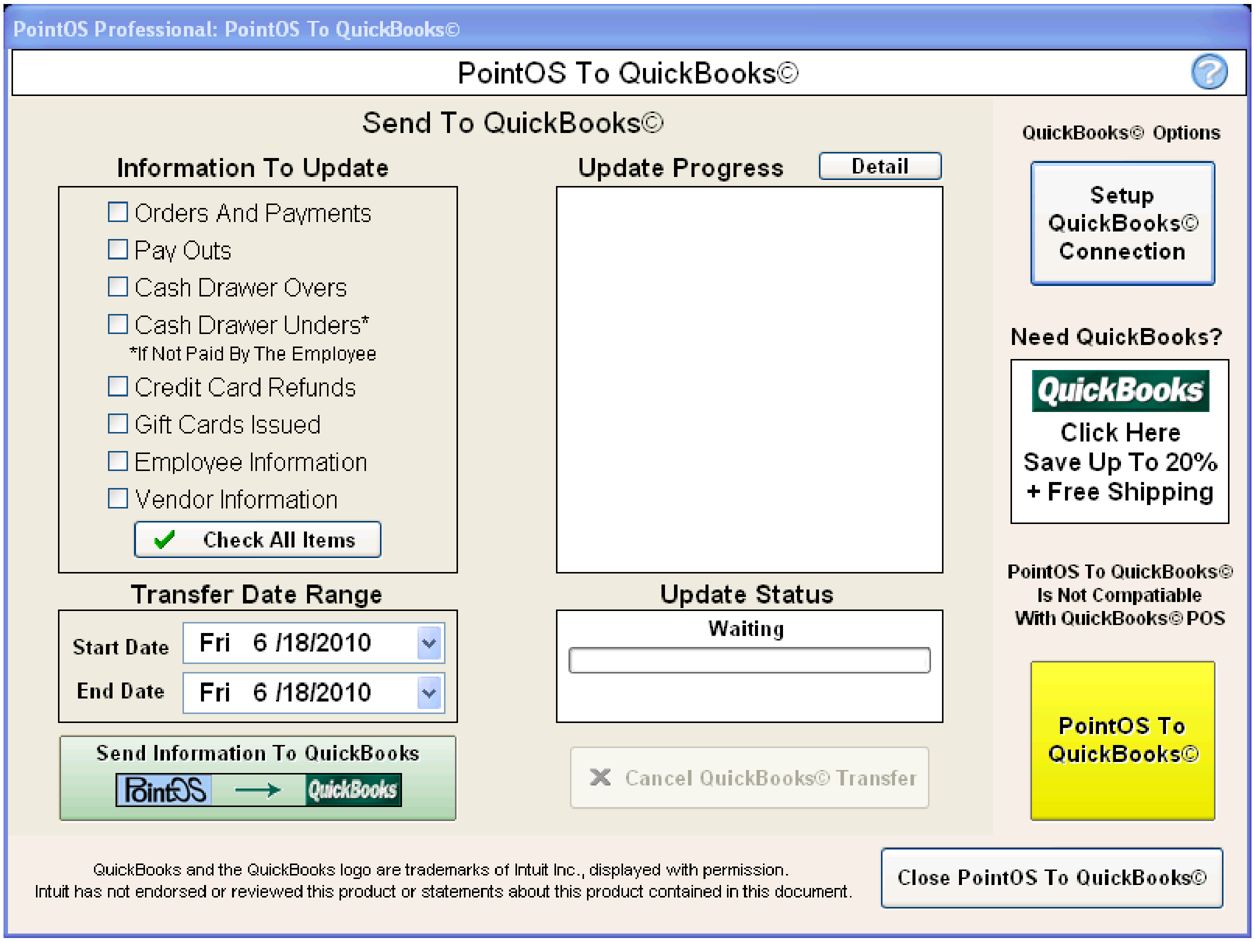


Figure 114: PointOS To QuickBooks©

6. Check one or more boxes to indicate which areas of information you would like to send to QuickBooks©. To check all boxes, select **Check All Items**.

NOTE: PointOS does not send inventory information to QuickBooks. PointOS does not work directly with QuickBooks Payroll Service.

7. Select the **Start Date** to indicate which items to send to QuickBooks©.
8. Select the **End Date** to indicate which items to send to QuickBooks©.
9. Select **Send Information To QuickBooks**.

The **Update Progress** area shows information about the transfer.

10. Select **Detail** to view more information.

The **Update Status** area indicates the status of your transfer.

11. Select **Cancel QuickBooks© Transfer** to stop the transfer before it has finished.
12. Select **Close PointOS to QuickBooks©** when you have finished.

Disable UAC

When using Windows Vista or Windows 7, PointOS to QuickBooks may not operate correctly when User Access Control (UAC) is enabled.

To disable UAC, complete the following steps:

1. Open the **Control Panel**.
2. Under **User Account and Family** settings, select **Add** or **remove** user accounts.
3. Select one of the user accounts.
4. Select **User Accounts** from the heading.
5. Select **Turn User Account Control On** or **Off**.
6. Uncheck the **Use User Account Control (UAC) to help protect your computer** box. Select **OK**.

The system will prompt you to reboot your computer. Do so when ready.

Reports and Sales Reports Menus

Overview

The **Reports** and **Sales Reports** menus offer an in-depth view at different activities within PointOS. The screens for each report have similar options and the steps for generating, exporting, or printing the reports are the same.

This chapter explains the basic process for report options, and generating, exporting, and printing the reports. Then it provides a brief description of each report.

Date Range

Most reports include the **Start Date** and **End Date** in the *Report Options*. For reports that show a specific date range, you must select the **Start Date** and the **End Date**. Refer to the "Setting the Date" section in this Manager Manual for more information.

NOTE: If a start date or end date falls in the middle of a report period, you will get the entire report period. For example, if you ask for a Monthly report but only set the start date half-way through a month, you will get the entire month. Reports also begin and end at the day start time set in *Main* Settings. Refer to the " Setup" section in this Manager Manual for more information about setting the day start time.

Show Report Detail

Many reports have extra detail that you may want to see.

To get more detail on these reports, check the **Show Report Detail** box.

Generate Report

To generate a report, complete the following steps:

1. Select the report you want to generate from the **Reports** menu or the **Sales Reports** menu.
2. In the **Report Options** area, use the drop down arrows to select the options appropriate to the data you want to view for the selected report.
3. Select **Generate Report**. Some reports are very database intensive and may take from 1 to 10 minutes to run. Please be patient.

The system displays the report details in the left side of the screen. Use the **Up** and **Down** arrows to navigate within the report.

Export Report

NOTE: You must have Microsoft Excel installed on the computer generating the report.

To export a report to Microsoft Excel, complete the following steps:

1. After you have generated the report, select **Export Report** to Excel.

The system opens a *Save As* dialog box.

2. Indicate the directory location to save the report and change the file name from the default, if desired.
3. Select **Save**.

The system opens Microsoft Excel with the selected report data.

Email Report

NOTE: You must have Microsoft Excel installed on the computer sending the report.

To send a report as an Email attachment, complete the following steps:

1. After you have generated the report, select **Email Report as Attachment**.

The system opens the *Email Report* screen.

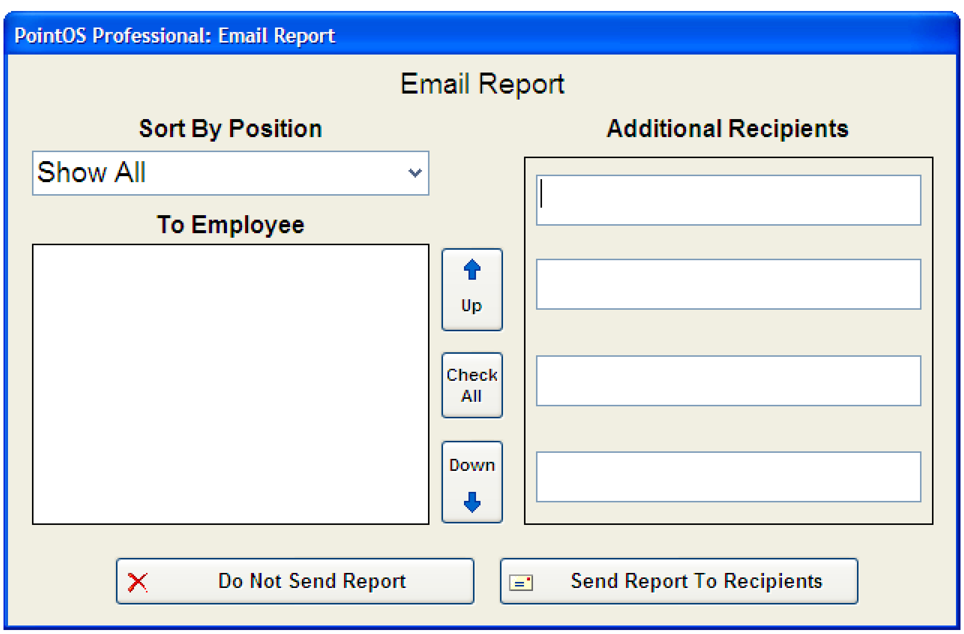


Figure 115: Email Report

2. To narrow the list of employees who will receive the report, select a position from the **Sort By Position** drop down list.
3. Check the box next to the employee(s) to whom you want to send the report. Use the **Up** and **Down** arrows to navigate through the list of employees. Select **Check All to** send the report to all of the employees in the current list.
4. To send the report to up to four additional recipients, enter the recipient's email address in the **Additional Recipients** fields.
5. Select **Send Report To Recipients** to send the report. Select **Do Not Send Report** to close the *Email Report* screen without sending emails.

Print or Export Report

After you have generated the report, you can print or export the report.

Select **Export Report to Excel** to export the report.

Select **Print Report** to print the repot to your default printer.

Report Descriptions

Current Inventory

The **Current Inventory Report** gives you a report of what goods you currently have on hand to sell, sorted by Vendor, Type, Group, and/or Location. Your inventory is depleted when using Inventory Control.

Inventory Depletion

The **Inventory Depletion Report** gives you a report of inventory items that have been used during the selected time period. It indicates the name of the items, the type, the storage location, how many cases, bottles, kegs, or items have been used, and the total value of the inventory depleted for each listing, as well as the total value of all items.

Manager Changes

The **Inventory Change Report** gives you a report of any changes made to inventory from the Manager's area.

Item Cost/Price

The **Item Cost/Price Report** provides a list of all of the menu items you have available for sale. It shows the different prices charged for each item.

Item Purchase Report

The **Item Purchase Report** gives you a list of goods that it is time to purchase. The report is broken down by vendors. Recommendations for these purchases come from the Par amount indicated in Inventory Setup. Refer to the "Inventory Item Setup" section in this Manager Manual for more information.

Closing Reports

When an employee performs the cashier out function in PointOS, he or she creates a **Closing Report** to let the manager know if anything was broken or if an item has run out of stock.

When you select **Closing Reports** from the **Reports** menu, the system displays the *Closing Reports* screen.

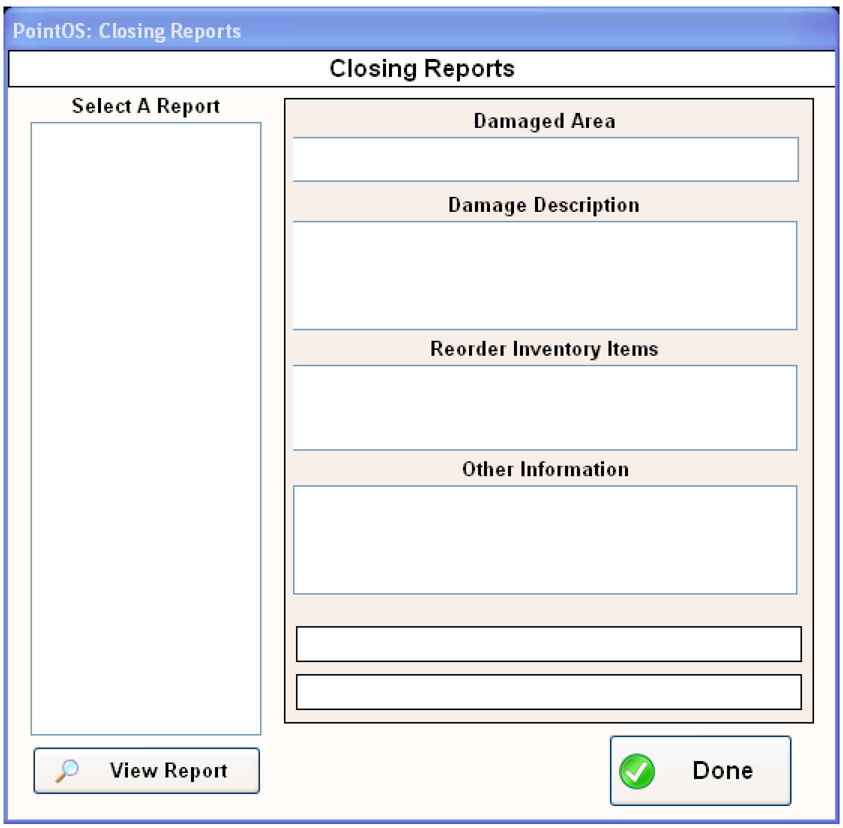


Figure 116: Closing Reports Screen

Highlight the report you want to view from the left side of the screen and select **View Report**.

The system displays the report information in the **Damaged Area**, **Damage Description**, **Reorder Inventory Items**, and **Other Information** areas.

Select **Done** when you have finished viewing the Closing Reports.

Incident Reports

Employees can file a report for any type of incident that happens at the location, such as an accident.

When you select **Incident Reports** from the **Reports** menu, the system displays the *Incident Reports* screen.

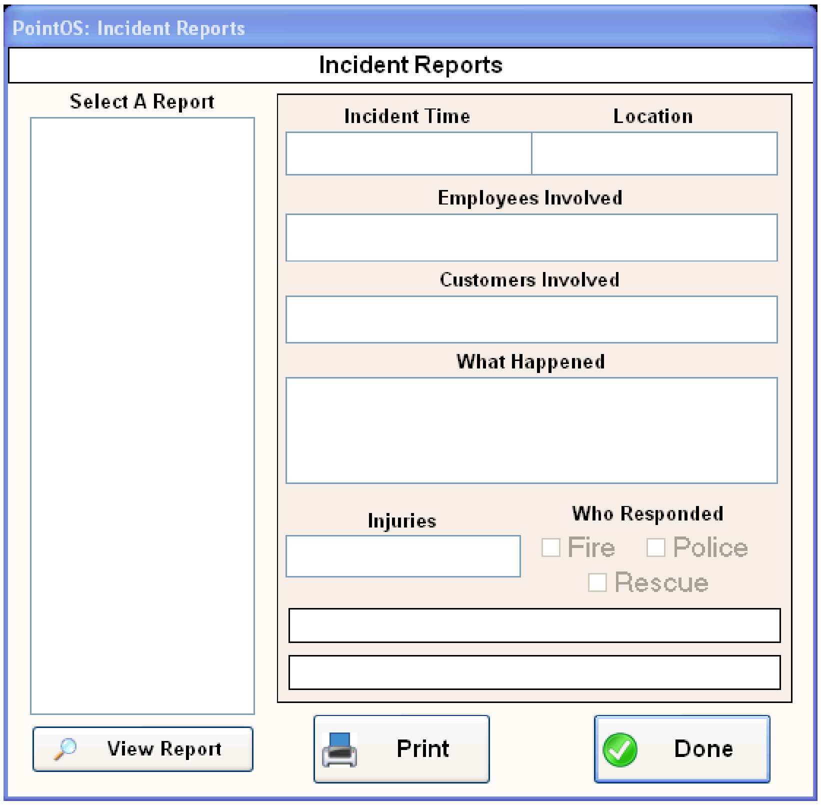


Figure 117: Incident Reports Screen

Highlight the report you want to view from the left side of the screen and select **View Report**.

The right side of the screen displays the following information:

- Incident time
- Employees involved
- Customers involved
- A description of what happened
- Any injuries
- Whether the Fire, Police, or Rescue services responded
- Who generated the report
- The report date

Select **Done** when you have finished viewing the Incident Report.

Today's Conditions

When a cashier cashes in for the day in PointOS, he or she can indicate the weather conditions. The **Today's Conditions** Reports displays this information, which you can use to evaluate unusual sales conditions.

When you select **Today's Conditions** from the **Reports** menu, the system displays the *Today's Conditions* screen.

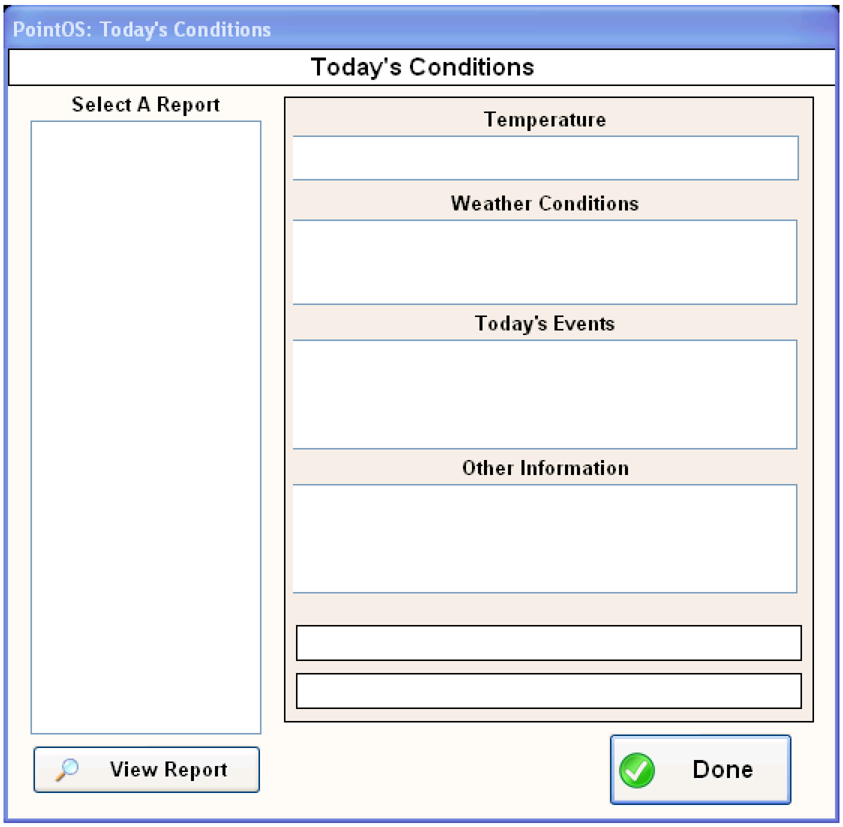


Figure 118: Today's Conditions Report

Highlight the report you want to view from the left side of the screen and select **View Report**.

The system displays the report information in the **Temperature**, **Weather Conditions**, **Today's Events**, and **Other Information** areas.

Select **Done** when you have finished viewing the Today's Conditions reports.

Cashier In/Out

The **Cashier In/Out Report** provides details about when each cashier started and ended his or her cash drawer. It also shows if the cash drawers were off and how much a server might owe.

Cash Out

The **Cash Out Report** provides details about each cash out for the selected date(s).

Cash Back

The **Cash Back Report** provides details about the amount of cash back requested by customers during the selected time frame.

Drawer Reverts

If a server mistakenly closes out a cash drawer, it can be reopened. The **Drawer Reverts Report** indicates you if this has happened and why.

Employee Clock In/Out

The **Employee Clock In/Out Report** indicates what time each server clocked in and out.

Employee Hours

The **Employee Hours Report** provides the time card and reported tips for each employee for the selected time period to use for completing your payroll.

NOTE: PointOS to QuickBooks© does not send any payroll information or support QuickBooks© payroll service.

Item Discounts

The **Item Discounts Report** indicates if menu items were sold at a reduced price and why. However, this report will not reflect modifiers that affect a menu item with negative dollar amounts.

Order Discounts

The **Order Discounts Report** indicates if an order’s total amount was reduced and why. However, this report will not show sales reduced by special pricing set for employees and good customers.

Drink Chip Report

The **Drink Chip Report** indicates the date, time, order item, number of drink chips redeemed and issued, and the server for drink chips during the selected time frame.

Pay Outs

The **Pay Outs Report** indicates the amount and recipient of any pay outs. Pay outs are a good way of tracking cash payments to entertainment, employees, or vendors. These pay outs are also reflected in the cashier out reports.

Pay Outs By Category

The **Pay Outs By Category** is similar to the Pay Outs Report, but it provides additional detail about the transactions broken down into categories.

Item Voids

The **Item Voids Report** indicates any items that were removed from a sales check and why.

Order Voids

The **Order Voids Report** indicates any customer orders that were voided and why. Only open orders can be voided by a server.

Access Denied

The **Access Denied Report** provides a list of all unsuccessful attempts to try and access a secure area. This is a good report to run to see if a someone is trying to get into an area that they are not authorized to access.

No Sales

The **No Sales Report** shows you when the cash drawer was popped at the times when no sale transaction was made. This occurs most frequently when a server is making change, but could indicate some sort of fraud. The report also will show you who popped the drawer and at what time.

Active Customer List

The **Active Customer List Report** provides a listing of any changes to the Customer Mailing List for the selected date range. You can use this to ensure that your Customer Mailing List is up to date before doing promotional mailings.

Customers Report

The **Customers Report** indicates all of the customers who have been added to the system during the selected date range. It also indicates how much the new customers spent as well as how often they have visited.

Door Report

NOTE: This report is only available if you are using PointOS DoorMan as one of your licensed stations.

The **Door Report** provides a listing and total of members through the door on the selected date. It also shows the time the member arrived.

Guest Report

NOTE: This report is only available if you are using PointOS DoorMan as one of your licensed stations.

The **Guest Report** indicates all orders with guests entered, including number of items ordered and average sale per guest. It does not include discounts or refunds.

Member Report

NOTE: This report is only available if you are using PointOS DoorMan as one of your licensed stations.

The **Member Report** provides a listing of members, with the membership type and dates, the last visit, and the amount spent.

Detailed Report

The **Detailed Report** includes the following information for the selected time frame:

- Sales by Group
- Sales by Category
- Payments by Type
- Total Cash Back
- Check Detail
- Cash Report
- Sales Report
- Total Net Sales

Cost Of Goods

The **Cost of Goods Report** shows what you have spent on ingredients for the things you sell. You can compare that to how much revenue each item generates. This will return a percentage that will give you your overall item cost.

Orders

The **Orders Report** gives you a list of all orders both open and closed. When you select an order in this list, the system displays a copy of the check.

Open Orders

The **Open Orders Report** indicates the orders on the system have not yet been paid. When you select an order in this list, the system displays a copy of the check.

Payments

The **Payments Report** shows all the payments made during the selected time frame.

Gift Cards

The **Gift Cards Report** indicates the gift cards that have been redeemed as payment during the selected time frame.

Personal Checks

The **Personal Checks Report** indicates the personal checks that have been used as payment during the selected time frame.

Taxes

The **Taxes Report** provides a breakdown of your sales and how much you have collected in taxes. This report will show both add on tax and tax that is included in a menu item price.

Credit Batches

If you are using PointOS to batch your credit cards, the **Credit Batches Report** indicates the credit card batch amounts and result for the selected time frame.

Credit Card Refunds

The **Credit Card Refunds Report** indicates any credit card refunds that have been processed for the selected time frame.

Daily Report

The **Daily Report** provides detailed information about all days in the selected time frame. This information includes pay outs, drawer over/unders, tips, discounts, voids, cash sales, credit card sales, total orders, items sold, taxes collected, net sales, gross sales, and total cash on hand.

Weekly Report

The **Weekly Report** provides detailed information about all the weeks in the selected time frame. This information includes pay outs, drawer over/unders, tips, discounts, voids, cash sales, credit card sales, total orders, items sold, taxes collected, net sales, gross sales, and total cash on hand.

The entire week is included in the report, regardless of whether the start date or end date are in the middle of a week.

Monthly Report

The **Monthly Report** provides detailed information about all months in the chosen time frame. This information includes pay outs, drawer over/unders, tips, discounts, voids, cash sales, credit card sales, total orders, items sold, taxes collected, net sales, gross sales, and total cash on hand.

The entire month is included in the report, regardless of whether the start date or end date are in the middle of a month.

Sales By Hour

The **Sales By Hour Report** provides all the sales broken down into 24 hours. It also indicates the total items sold.

Sales By Day

The **Sales By Day Report** provides all of the sales for the days included in the selected date range. However, it will not provide as much detail as the daily report.

Sales By Week

The **Sales By Week Report** provides all of the sales broken down into one week blocks. However, it will not provide as much detail as the weekly report.

The entire week is included in the report, regardless of whether the start date or end date are in the middle of a week.

Sales By Month

The **Sales By Month Report** provides all of the sales group in one month blocks. However, it will not provide as much detail as the monthly report, but will run much more quickly.

The entire month is included in the report, regardless of whether the start date or end date are in the middle of a month.

Sales By Item

The **Sales By Item Report** indicates all of the items sold during a specific period of time. It will group the items by type, giving you a total count. To view associated modifiers, check the Show Report Detail box.

This report is very database intensive and may take quite a while to execute.

Item Sales By Hour

The **Item Sales By Hour Report** indicates all of the items sold during a specific period of time broken down into 24 hour increments. It will group the items by type, giving you a total count. To view associated modifiers, check the **Show Report Detail** box.

This report is very database intensive and may take quite a while to execute.

Item Sales By Server

The **Item Sales By Server Report** indicates the sales by server. It also shows what items each server sold during the selected date range.

Item Sales By Server Ring

The **Item Sales By Server Ring Report** indicates the sales by server on each transaction.

Items Ordered By Time

The **Items Ordered by Time Report** includes the date, time, quantity, item, and server for all items ordered during the selected time frame.

Happy Hour Item Sales

The **Happy Hour Item Sales Report** indicates the item, quantity, and sales for the selected time frame.

Sales By Server

The **Sales By Server Report** indicates sales for a selected time period broken down into the different servers that were active during this period.

Group Sales By Server

The **Group Sales by Server Report** indicates the sales by server for a selected time period broken down into the different groups.

Modifier Report

The **Modifier Report** indicates modifiers, submodifiers and the amount ordered during the selected time frame.

Sales By Category

The **Sales By Category Report** indicates items sold in specific categories.

Sales By Group

The **Sales By Group Report** indicates the total amount of items sold broken down by group, as well as the total sales for the selected time frame.

Sales By Payment Type

The **Sales By Payment Type Report** breaks down sales for a selected time period into the different kinds of payments, including cash and credit cards.

Sales By Delivery

The **Sales By Delivery Report** indicates the sales made for delivery for a specific period of time.

Sales By Station

The **Sales By Station Report** indicates sales for a selected time period broken down into the different stations that were active during this period.

Item Sales By Room

The **Item Sales By Room Report** breaks down the sales by room. It also indicates what items were sold from that room, during the selected date range.

This report is very database intensive and may take quite a while to execute.

Maintenance Menu

Overview

The **Maintenance** menu allows you to keep your system running fast and efficiently. You can archive sales, speed up and back up the database, and delete unnecessary or sensitive data such as credit cards.

Stations Manager

The *Stations Manager* screen allows you to shut down or force a restart of all connected stations. This is required for backing up or compacting the database, or when making some changes to the system.

To open the *Stations Manager* screen, select **Stations Manager** from the **Maintenance** menu.

The system displays the *Stations Manager* screen.

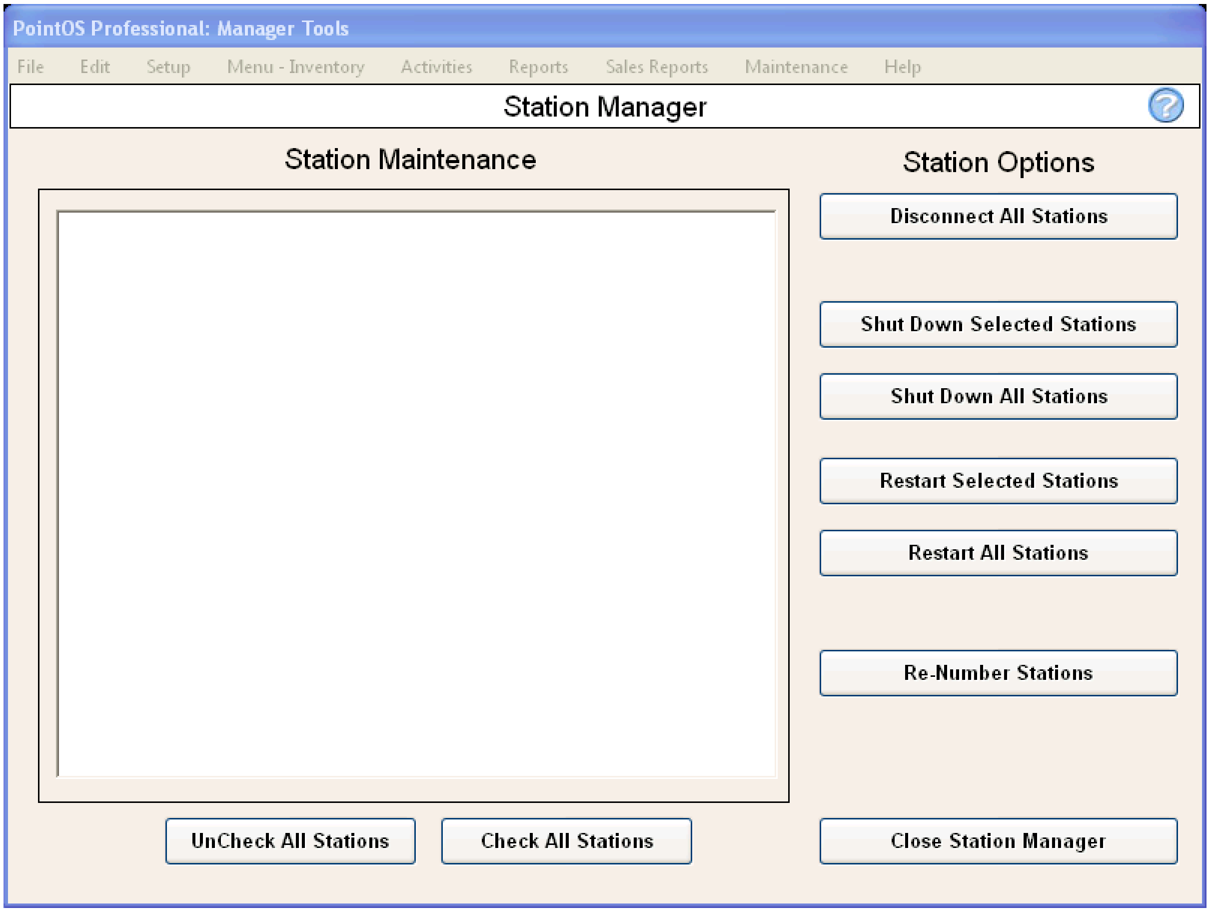


Figure 119: Station Manager Screen

The *Station Maintenance* area lists the stations that are currently connected to your database. Select a station by checking the box next to the listing. You can select **Uncheck All Stations** or **Check All Stations** to quickly indicate the stations with which you want to work.

To disconnect all stations, select **Disconnect All Stations**.

To shut down the selected stations, select **Shut Down Selected Stations**. To shut down all stations, select **Shut Down All Stations**.

To restart the selected stations, select **Shut Down Selected Stations**. To restart all stations, select **Shut Down All Stations**.

Re-number Stations

NOTE: To renumber stations, all stations must be disconnected and you cannot have any cash drawers logged in.

To re-number the stations, select **Re-Number Stations**.

The system displays the *Re-Number Stations* screen.

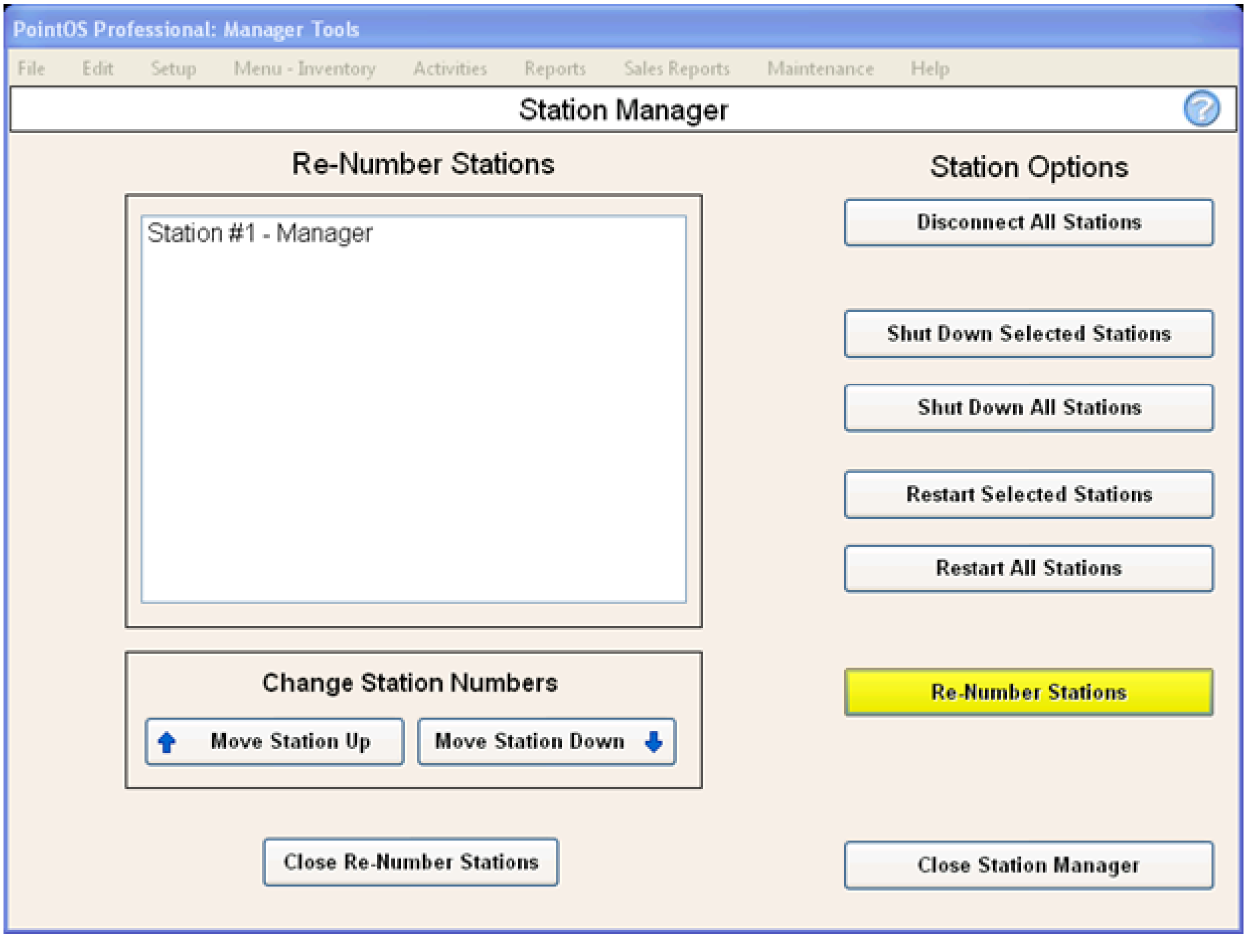


Figure 120: Renumber Stations Screen

Highlight the station you want to re-number.

Use the **Move Station Up** and **Move Station Down** arrows to reorder your list of stations.

When you have finished re-numbering the stations, select **Close Re-Number Stations**.

Close Station Manager

When you have finished managing the stations, select **Close Station Manager**.

Disconnect Stations

The **Disconnect Stations** option forces all stations to stop receiving or sending information to or from the database. This is required when backing up or compacting the database. It may take up to a minute to disconnect all stations.

To quickly disconnect all stations, select **Disconnect Stations** from the **Maintenance** menu. The system displays a Manager Alert reminding you that the process takes a few moments.

Select **OK**.

Door Manager Settings

The *Door Manager Settings* screen allows you to set up the options when using PointOS DoorMan.

To open the *Door Manager Settings* screen, select **Door Manager Setup** from the **Maintenance** menu.

The system displays the *Door Manager Settings* screen.

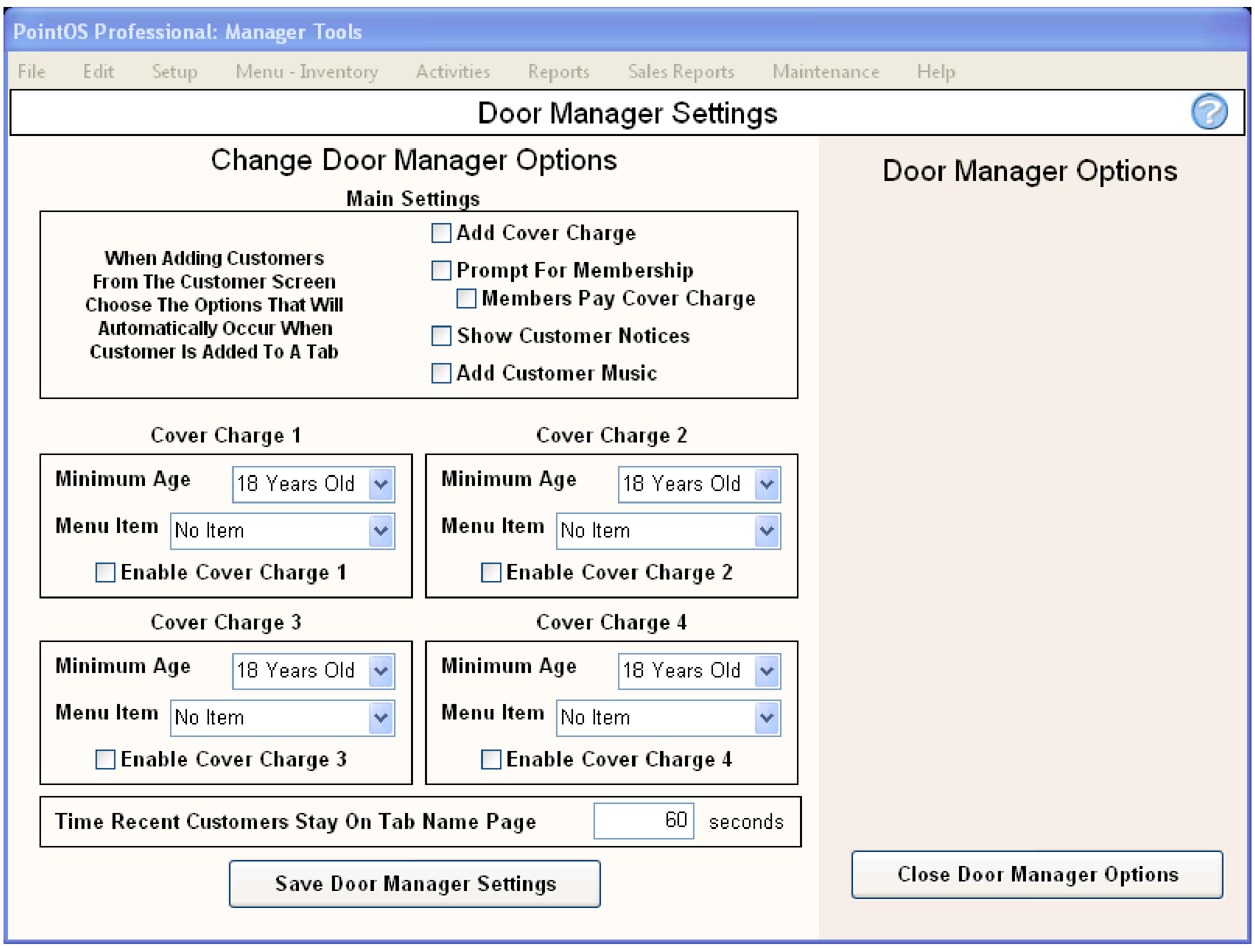


Figure 121: Door Manager Settings

To set your Door Manager options, complete the following steps:

1. Check the **Add Cover Charge** box to automatically add the appropriate cover charge when a new customer is added to a tab at the door.
2. Check the **Prompt for Membership** box to prompt for membership card when a new customer is added to a tab at the door. If applicable, check the **Members Pay Cover Charge** box.
3. Check the **Show Customer Notices** to show any customer notices when a new customer is added to a tab at the door.
4. Check the **Add Customer Music** box to allow the Door Manager to add customer music requests.
5. You can enable up to four different cover charges. For each cover charge, complete the following steps:
   - Select the **Minimum Age** from the drop down list.
   - Select the **Menu Item** associated with the cover charge from the drop down list. You must have already set up the Menu Items. Refer to the " Setup" section in this Manager Manual for more information about setting up menu items.
   - Check the associated **Enable Cover Charge** box.
6. Indicate the amount of time recent customers stay on the Tab Name page by entering the number of seconds in the **Time Recent Customers**… field.
7. Select **Save Door Manager Settings** to save your changes.
8. Select **Close Door Manager Settings** to close the screen when you have finished.

Shut Down All Stations

The **Shut Down All Stations** option forces all stations to disconnect. This is useful when upgrading the system. This function may take up to two minutes to complete.

To shut down all stations, select **Shut Down All Stations** from the **Maintenance** menu. The system displays a warning message.

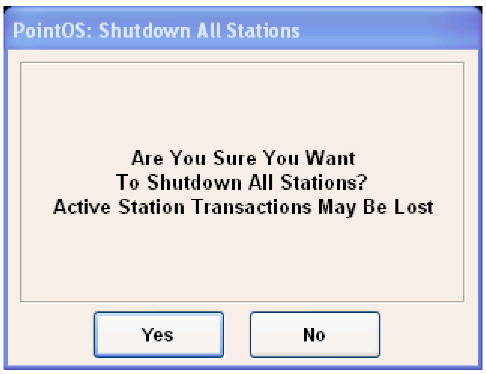


Figure 122: Shut Down All Stations Warning

Select **Yes** to continue, or select **No** to close the warning without shutting down the stations.

Cash Out All Servers Drawers

The **Cash Out All Servers/Drawers** option cashes out all open cash drawer and all open servers and resets the drawers and servers to zero. This is used as a last resort if a cash drawer is not closing properly.

NOTE: This option cannot be reversed. It can cause improper cash out reporting.

To cash out all servers/drawers, select **Cash Out All Servers Drawers** from the **Maintenance** menu.

The system displays a warning message to make sure that you want to proceed. Select **Yes** to continue. Or select **No** to close the dialog box without cashing out all servers and drawers.

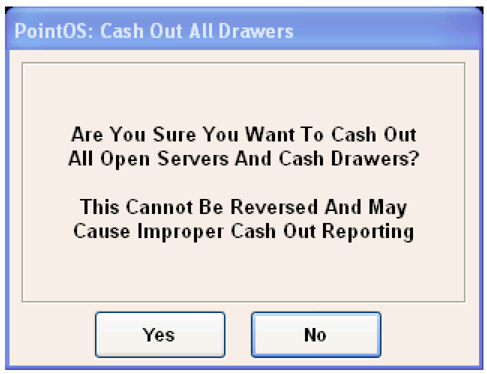


Figure 123: Cash Out All Drawers

The system displays a confirmation message indicating that all drawers and servers have successfully be cashed out to zero.

Backup Database

The **Backup Database** option allows you to create a copy of your database. This protects you if your computer ever becomes broken or corrupted. We recommend that you backup at least once a week.

NOTE: You can also set the system to backup automatically. Refer to the " Setup" section in this Manager Manual for more information.

You can back up to a remote device. Refer to http://support.microsoft.com/kb/207187 for more information.

To perform a database backup, select **Backup Database** from the **Maintenance** menu.

NOTE: You must use the computer running the server portion of PointOS to back up the database.

The system displays a dialog box to confirm that you want to backup the database.

Select **Yes** to continue, or select **No** to close the dialog box without performing a backup.

The system displays a *Create Database Backup* dialog box to save the database backup.

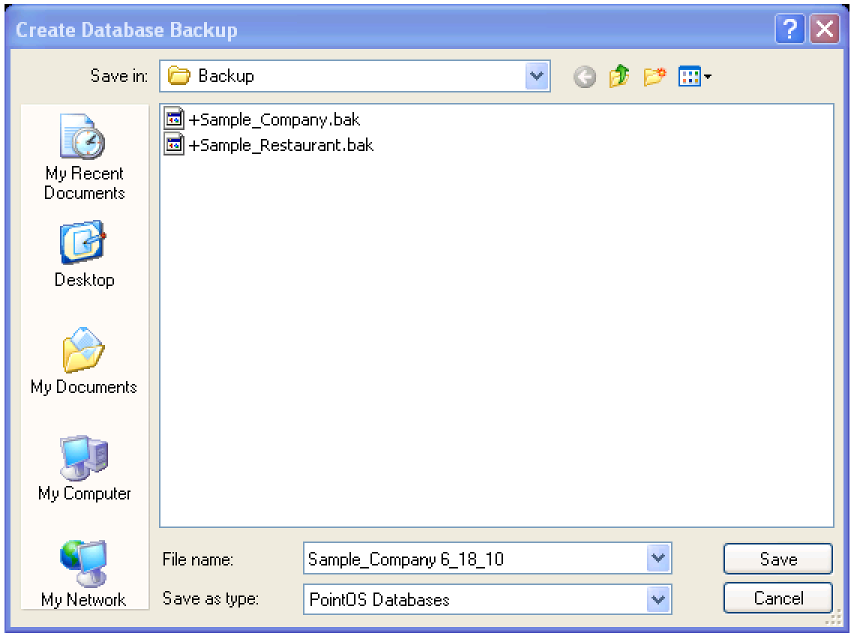


Figure 124: Create Database Backup Dialog

You can change the name of the database if necessary, but the file should be saved in the default Backup directory. Select **Save** to save the backup, or select **Cancel** to close the dialog box without saving a backup.

The system displays a *Manager Alert* notifying you that the backup was saved successfully. It also displays the location of the saved backup.

Database Cleanup

The *Database Cleanup* screen allows you to remove old or unnecessary information from your system to help reduce the size of the database and improve performance. We recommend that you clean the database every 6 to 12 months.

NOTE: This will not delete any settings, menu items, modifiers, employees, or customers.

DELETED DATA CANNOT BE RECOVERED. MAKE SURE YOU NO LONGER NEED THE DATA BEFORE DELETING.

NOTE: You should always make a backup of your database prior to running database cleanup.

To open the *Database Cleanup* screen, select **Database Cleanup** from the **Maintenance** menu.

The system displays the *Database Cleanup* screen.

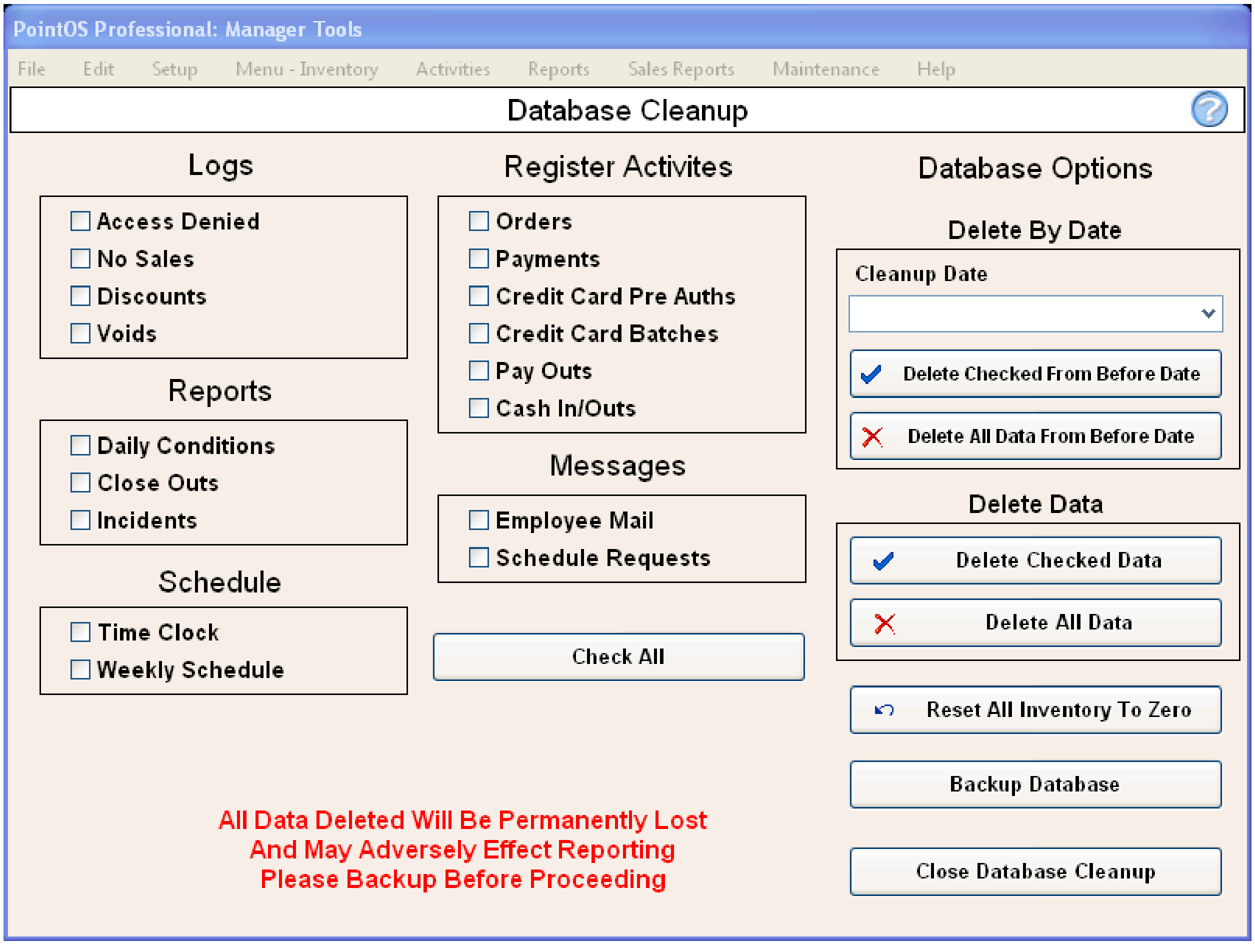


Figure 125: Database Cleanup Screen

To backup the database, select **Backup Database**.

Indicate the type of data you want to remove from the database by checking one or more boxes next to the selected data type. You can select **Check All** to quickly check all of the boxes. If you check all boxes and want to remove them, select **Uncheck All**.

NOTE: It is a good idea to remove Logs because they will not affect any of the most vital report-ing.

To remove data prior to a specific date, select a **Cleanup Date** from the drop down list. Select one of the following options to remove data:

- Select **Delete Checked From Before Date** to remove the data corresponding to the items you checked prior to the selected date.
- Select **Delete All Data From Before Date** to remove all data prior to the selected date.

To remove data up to the current date, select one of the following options:

- Select **Delete Checked Data** to remove the data corresponding to the items you checked.
- Select **Delete All Data** to remove all data.

The system displays a warning message to verify that you want to delete the selected data. Select **Yes** to continue, or select **No** to close the warning without cleaning the database.

The system displays a warning message to notify you that this cannot be undone. Select **Yes** to continue, or select **No** to close the warning without cleaning the database.

Reset All Inventory To Zero

The **Reset All Inventory To Zero** option zeros out all inventory to allow you to start your inventory counts over.

NOTE: This option cannot be reversed.

To set all inventory counts to zero, select **Reset All Inventory to Zero** from the *Database Cleanup* screen.

The system displays a warning message to make sure that you want to proceed. Select **Yes** to continue. Or select **No** to close the dialog box without resetting the inventory to zero.

The system displays a confirmation message indicating that the inventory items have been successfully reset to zero.

The system displays a warning message to make sure that you want to delete the Inventory Depleted Logs. Select **Yes** to continue. Or select **No** to close the dialog box without resetting the inventory depleted logs.

The system displays a confirmation message indicating that the inventory depleted logs have been successfully reset to zero.

Close Database Cleanup

When you have finished cleaning the database, select **Close Database Cleanup**.

Calibrate Scanner

NOTE: This option is only available if you have a compatible scanner attached.

The **Calibrate Scanner** options allows you to calibrate your new ID scanner.

Select **Calibrate Scanner** from the **Maintenance** menu.

The system displays a note to insert calibration paper into the scanner. Use the calibration paper that came with your scanner. You can also download and print out a new calibration sheet from the manufacturer's website.

When the calibration paper is loaded, select **OK**.

The system displays a manager alert notifying you that the calibration takes a few moments. Select **OK** to close the alert.

Clean Scanner

The **Clean Scanner** option allows you to clean your ID scanner if you are experiencing any problems with it.

Select **Clean Scanner** from the **Maintenance** menu.

The system displays a note to insert the cleaning paper into the scanner. Use the cleaning paper that came with your scanner, and follow the manufacturer's directions.

When the cleaning paper is loaded, select **OK**.

The system displays a manager alert notifying you that the cleaning takes a few moments. Select **OK** to close the alert.

Set Scanner Accuracy

The **Scanner Accuracy** screen allows you to set a range of accuracy for your scanner. The higher number accuracy you set, the more accurate your ID scans will be. However, damaged IDs may not be recognized.

Select **Set Scanner Accuracy** from the **Maintenance** menu.

The system displays the *Set Scanner Accuracy* screen.

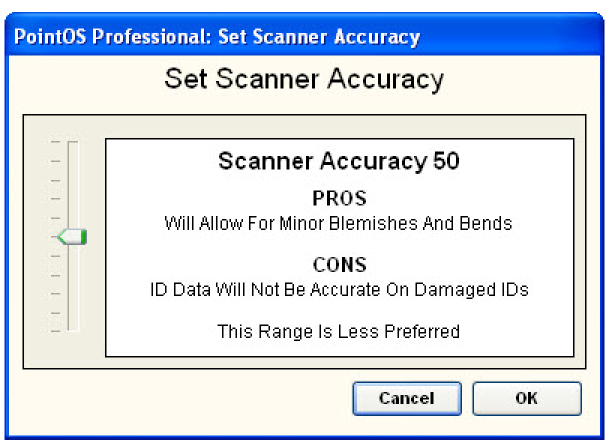


Figure 126: Set Scanner Accuracy Screen

Use the slider on the left to adjust the setting. The recommended range is from 60 to 90 to allow for minor wear on IDs, without sacrificing too much accuracy.

When you have the desired setting, select **OK**. Or select **Cancel** to close the *Set Scanner Accuracy* screen without adjusting the setting.

The system displays a manager alert notifying you that the scanner accuracy has been updated. Select **OK** to close the alert.

Update ID Scanner

The Update ID Scanner screen allows you to update your ID scanner software.

Select **Update ID Scanner** from the **Maintenance** menu.

The system displays the *Update Scanner Software* screen.

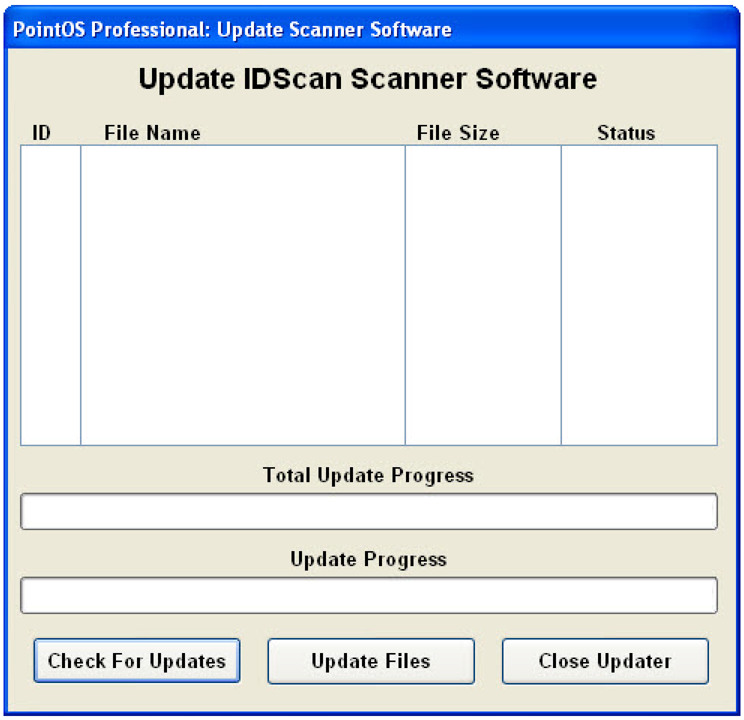


Figure 127: Update Scanner Software

Select **Check for Updates** to check for new ID scanner software.

Select **Update Files** to save any new files to your system.

Select **Close Updater** to close the *Update Scanner Software* screen.

Archive Items

The **Archive Items** option allows you to move old items to the archive part of the database to help speed up the system. Doing this along with compacting the database can greatly increase system speed. It does not delete information or affect reporting. You should archive items regularly as part of routine database maintenance. You can set items to archive automatically when compacting the database. Archive items is done automatically when using auto system maintenance. Refer to the "Database Setup" section in this Manager Manual for more information.

Select **Archive Items** from the **Maintenance** menu.

The system displays a warning message asking if you want to archive all closed items. Select **Yes** to continue, or select **No** to close the warning without archiving old items.

Archive Orders

The **Archive Orders** option allows you to move old orders to the archive part of the database to help speed up the system. It does not delete information or affect reporting. You should archive orders regularly as part of routine database maintenance. You can set old orders to archive automatically when compacting the database. Refer to the "Database Setup" section in this Manager Manual for more information.

Select **Archive Orders** from the **Maintenance** menu.

The system displays a warning message asking if you want to archive all closed orders. Select **Yes** to continue, or select **No** to close the warning without archiving old orders.

Delete PreAuths

The **Delete PreAuths** command credits back the $.01 on all preauths that have not been batched yet. This is done automatically when compacting the database. Refer to the "Database Setup" section in this Manager Manual for more information. If you are not using compact database, you should delete pre-authorizations frequently.

Select **Delete PreAuths** from the **Maintenance** menu.

The system displays a warning message asking if you want to delete all pre-authorizations. Select **Yes** to continue, or select **No** to close the warning without deleting the pre-authorizations.

Update All Music

When you add new songs to Windows Media Player, you should update all music to add the songs to the PointOS database.

NOTE: This is also usually done at startup.

Select **Update All Music** from the **Maintenance** menu.

The system displays a warning message asking if you want to update the music. Select **Yes** to continue, or select **No** to close the warning without updating the music.

Reset Damaged Songs

If a song fails to play, the PointOS database tags it as damaged. The **Reset Damaged Songs** option allows you to restore the damaged songs.

Select **Reset Damaged Songs** from the **Maintenance** menu.

The system displays a warning message asking if you want to reset the songs. Select **Yes** to continue, or select **No** to close the warning without resetting the songs.

Delete All Music

The **Delete All Music** option allows you to start over with new music. This function removes all music information from the database, and may have adverse effects on customer song lists.

NOTE: This DOES NOT delete any music files from your computer, just from the PointOS data-base. This selection is completely safe.

Select **Delete All Music** from the **Maintenance** menu.

The system displays a warning message asking if you want to delete the music. Select **Yes** to continue, or select **No** to close the warning without deleting the music.

Help Menu

Overview

The **Help** menu provides additional resources and support.

Online Manual

The Online Manual provides online support for using the manager functions of PointOS.

Select **Online Manual** from the **Help** menu.

The system displays the PointOS Professional Manager Help in a new tab of your browser window.

Manager Manual

The **Manager Manual** is this Manager Manual.

Select **Manager Manual** from the **Help** menu to open the PDF of the PointOS Professional Manager Manual in a new tab of your browser window.

The system displays the PointOS Professional Manager Help in a new tab of your browser window.

Check for Update

The **Check for Update** option opens the PointOS Updater.

NOTE: Updating PointOS will not uninstall SQL. You WILL NOT lose any data.

Select **Check for Update** from the **Help** menu.

The system displays the *PointOS Professional: Update Available* screen.

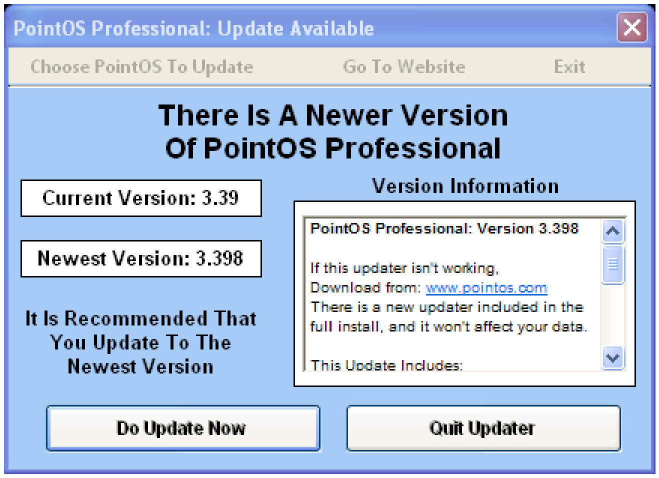


Figure 128: Update Available

The Updater displays the status of your software and information about the latest version of PointOS.

To re-install the software, select **Re-install Latest Version**.

Select the software to update from the **Choose PointOS To Update** drop down list.

To go to the website to get more information about the current version, select **Go To Website**.

When you have finished, select **Quit Updater** or **Exit**.

Remote Support

The **Remote Support** option allows PointOS technical support staff to access your system for assistance with troubleshooting.

Select **Remote Support** from the **Help** menu.

The system opens your web browser to the PointOS Professional Remote Support page.

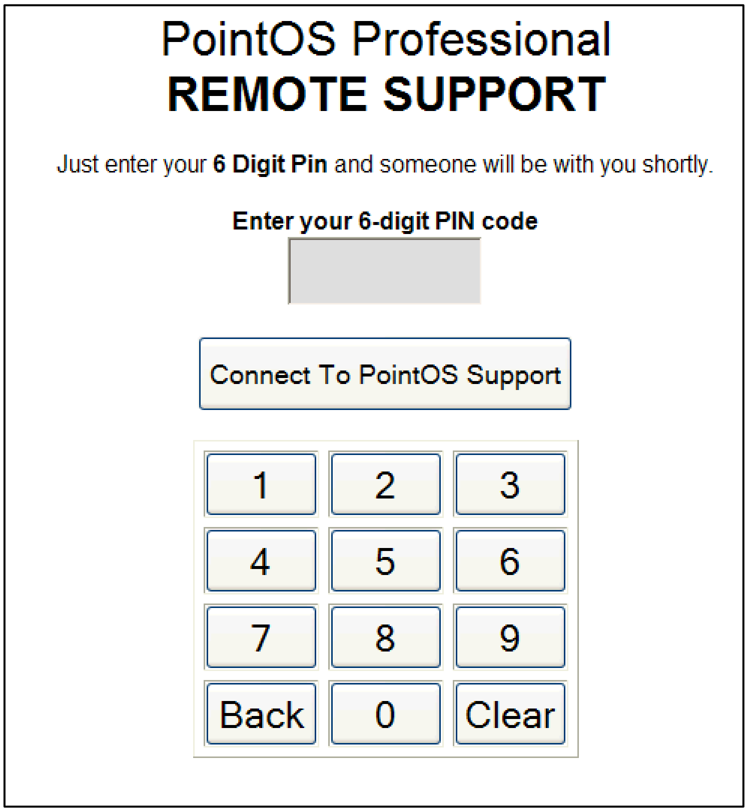


Figure 129: Remote Support

Enter the six-digit PIN provided by PointOS technical support and select **Connect To PointOS Support**.

The system opens the *Rescue Gateway* screen, which provides a log of activities during the remote support session.

During Remote Support, PointOS technical support will have control of your computer for troubleshooting. When the session ends, you can close the **Rescue Gateway** screen.

Register PointOS

The Register PointOS option allows you to enter your serial number when you have purchased PointOS if you have not already done this as part of the setup.

To open the *Enter Serial Number* screen, select **Register PointOS** from the **Help** menu.

Refer to the "Register PointOS" section in this Manager Manual for more information.

Upgrade PointOS

The **Upgrade PointOS** option allows you to purchase or enter an upgrade in your PointOS license.

Select **Upgrade PointOS** from the **Help** menu.

The system displays the *Upgrade* screen.

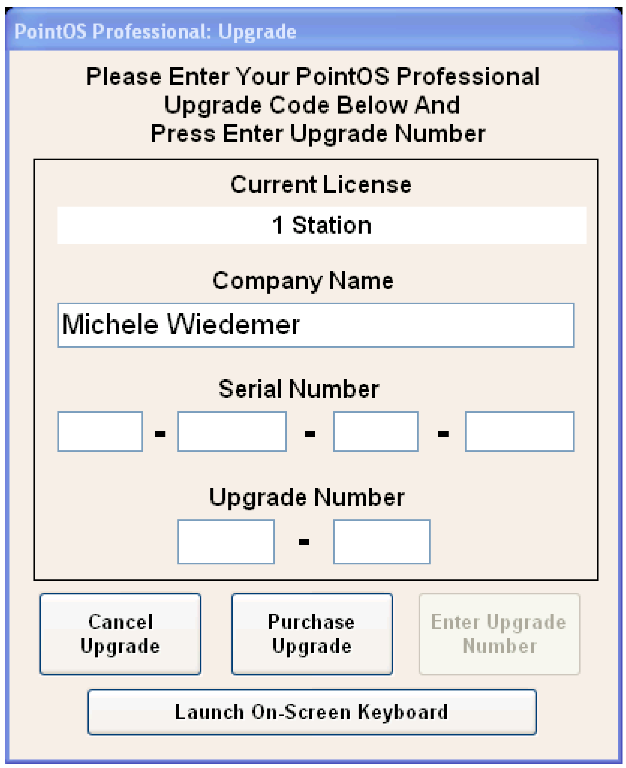


Figure 130: Upgrade Screen

To purchase an upgrade, select **Purchase Upgrade**. The system opens the PointOS purchase website in your browser. You can purchase up to 9 additional stations (for a total of 10 stations).

When you have your code, enter the **Upgrade Number** and select **Enter Upgrade Number**. Or select **Cancel Upgrade** to close the *Upgrade* screen without entering an upgrade.

Contact Us

The **Contact Us** option allows you to send an email to PointOS.

To contact PointOS support, complete the following steps:

1. Select **Contact Us** from the **Help** menu.

The system displays the *Contact Us* screen.

Figure 131: Contact Us

2. Select a **Subject** for your email from the drop down list.
3. **Update** or enter **Your Email Address**.
4. Enter your **Message**.
5. Select **Send** to deliver the email or **Cancel** to close the *Contact Us* screen without sending the email.

License Agreement

The **License Agreement** option displays the license agreement under which you installed PointOS.

Select **License Agreement** from the **Help** menu.

The system displays the *License Agreement*.

Select **Close** when you have finished viewing the license agreement.

About PointOS

The **About PointOS** option displays the PointOS company information, as well as the registration, version, and build date information.

Select **About PointOS** from the **Help** menu.

The system displays the *About PointOS* screen.

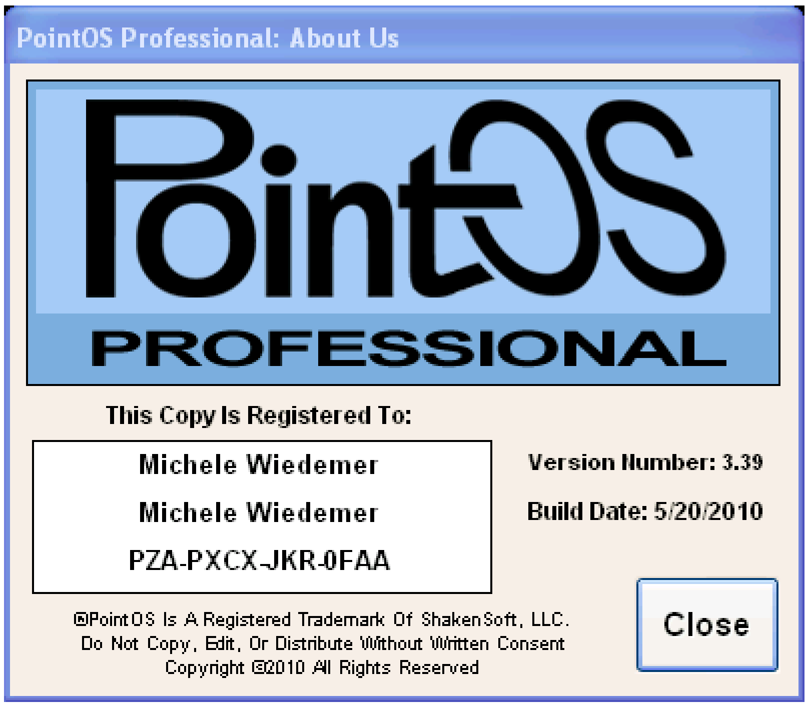


Figure 132: About PointOS

Select **Close** when you have finished viewing the information.

Technical Setup

This chapter includes instructions on completing tasks that are not specific to an individual screen.

Setting Up Multiple Stations

You can connect multiple clients to one central database computer. Keep the following in mind when selecting the computers for the server and the client(s).

- The central database computer cannot be running Windows XP Home Edition or Windows Vista Home Basic.
- The client computers may be any Windows XP or Windows Vista machine.

To set up multiple stations, complete the following steps:

1. Make sure that all of the computers are on the same workgroup. Refer to Windows help for more information on setting up a workgroup.
2. Install PointOS Client and Server on the computer that will serve as the central database computer. Refer to the “ ” section in this Manager Manual for more information about installing PointOS Client and Server.
3. Setup your database on the server computer. Refer to the “ Database” section in this Manager Manual for more information on setting up a new database.
4. Install PointOS Client Only on the client computer(s) that connect to the central database server. Refer to the “ ” section in this Manager Manual for more information about installing PointOS Client only.
5. While installing PointOS Client Only on the client computers, select the computer name of the central database server and the database you created. If the computer does not show up on the list, your workgroup or firewall are not set up correctly.

Setting Up XP Server Rights Manually

The PointOS Installer should grant access rights to the SQL server on the database computer. However, the operating system protection sometimes interferes. In this case, you must set the rights manually.

To set rights manually for an XP computer used as the central database server, complete the following steps:

1. Select **Control Panel** from the Windows **Start** menu.
2. Select **Administrative Tools**.

3. Select **Computer Management**.
4. From the *Computer Management* screen, select **Local Users And Groups**.
5. Select **Groups**.

The 3 SQL server groups for PointOS are:

- SQLServer2005MSSQLServerADHelperUser$SHAKENSOFT
- SQLServer2005MSSQLServerADHelperUser$SHAKENSOFT
- SQLServer2005SQLBrowserUser$SHAKENSOFT

6. You will need to add everyone in your network to all three SQL server groups. Complete the following steps:
   - Select the group name.
   - Select **Add** to add a user.
   - The system displays a dialog box to select the users. Enter the object name everyone.
   - Select **OK**.
   - Repeat for the other two SQL server groups.

To setup rights manually for a Vista computer used as the central database server, complete the following steps:

1. Find your computer name by going to **Control Panels – System – Advanced System Settings.** Select the **Computer Name** tab.
2. Select **Run** from the **Start Menu**
3. Enter **cmd**.
4. Right click on **cmd** when it comes up in the search results. Select **Run as Administrator**. (This step is only necessary if you have UAC enabled.)
5. In the command window, enter the instructions indicated below, substituting your computer's name found in step one for each instance of "computername". Press **ENTER** after each line.
   - net localgroup SQLServer2005SQLBrowserUser$**computername** Everyone /add
   - net localgroup SQLServer2005MSSQLUser$**computername**$SHAKENSOFT Everyone /add
   - net localgroup SQLServer2005MSSQLServerADHelperUser$**computername**$ Everyone /add

Setting Up a Generic Driver for Receipt Printing

Windows must recognize your receipt printer before it will work with PointOS Professional. You may install the printer using the provided drivers from the manufacturer, but sometimes these drivers are hard to find. Instead, you may use the **Generic - Text Only** driver included with Windows.

NOTE: The generic driver may not work for all receipt printers.

Complete the following steps to set up your receipt printer with a generic driver.

1. Select **Control Panel** from the Windows **Start** menu.
2. Select **Add Printer**.

The system displays the *Add Printer Wizard*.

3. Select **Next** to continue.
4. On the *Local or Network* screen, select **Add a Local Printer** attached to this computer. If you are using Windows XP, uncheck the **Automatically detect and install my Plug and Play printer**.
5. On the *Select a Printer Port* screen, select **USB001(Virtual printer port for USB**) from the **Use the Following Port** drop down list. Select **Next** to continue.
6. On the *Install Printer Software* screen, select **Generic** in the **Manufacturer** area.
7. Select **Generic/Text Only** in the **Printers** area.
8. Select **Next** to continue.
9. On the *Name Your Printer* screen, keep the **Generic/Text Only** name in the **Printer Name** field.
10. For **Do you want to use this printer as the default printer**, select **No**. In Windows XP, uncheck the **Set as the default printer** box.
11. On the *Printer Sharing* screen, select **Do not share this printer**. Select **Next** to continue.
12. On the *Print Test Page* screen, select **No** for **Do you want to print a test page**. Select **Next** to continue.
13. Select **Finish** to finish adding your printer.
14. If Windows XP displays the *Print to File* screen, select **Cancel**.
15. Restart PointOS to load the new printer into the system.

Setting the Time

You can use the system clock to set times in many of the PointOS screens.

1. For a time field, select the drop down arrow to display the system clock.

The system displays the clock.

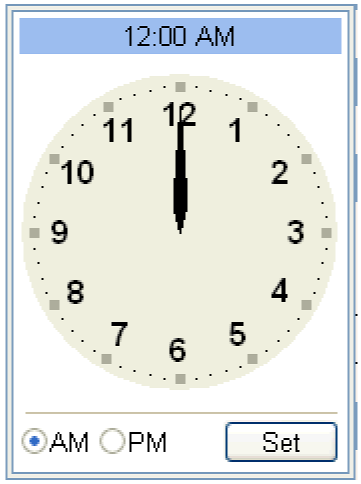


Figure 133: Setting The Time

2. Using the mouse, left click to set the hour.
3. Right click to set the minutes. Hold down the Control key while you click to constrain the minutes to five minute increments.
4. Select **AM** or **PM.**
5. Select **Set**.

Setting the Date

You can use a calendar to set dates in many of the PointOS screens.

1. For a date fields, select the drop down arrow to display the calendar.

The system displays the calendar.

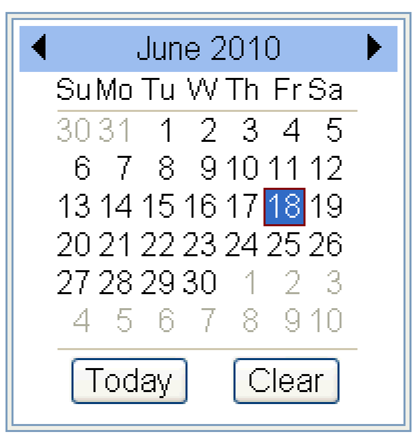


Figure 134: Setting the Date

2. Using the mouse, click the date you want to select. You can select the left or right arrows to move back or forward one month at a time.

Setting Up a Merchant Warehouse Account

Getting a Merchant Warehouse account and using them is completely **FREE**. Once you get an account, setup in PointOS takes just minutes.

Complete the following steps to obtain a Merchant Warehouse Account.

1. From the *Payment Setup* screen, select **Get a Merchant Warehouse Account**.

The system displays the PointOS website showing the form where you can get a Merchant Warehouse Account.

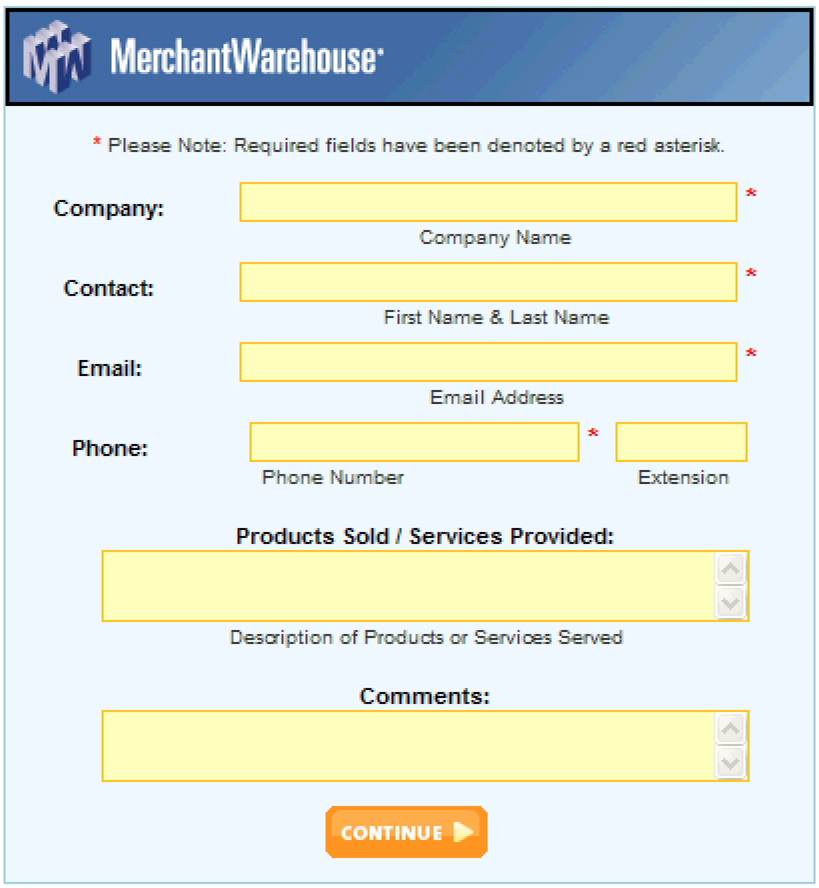


Figure 135: Merchant Warehouse Account Sign Up Form

2. Fill out the required information and follow the instructions to complete the process. Make sure to mention PointOS Professional to get proper pricing and setup.

You will receive an email from Merchant Warehouse containing information about your account, including the Site Name, Site ID, and Site Key.

3. Once you have a Merchant Warehouse Account, you must enter the correct information and options on the *Payment Setup* screen. Refer to the " Setup" section in this Manager Manual for more information.
4. Make sure to enable credit cards for EACH station that will accept credit cards. Refer to the " Settings" section in this Manager Manual for more information.
5. Restart PointOS to finalize the new settings.

Setting Up Music

PointOS integrates with Windows Media Player to allow you easy control over your music from within the Media Player environment.

Importing Music

All music in PointOS comes from Windows Media Player. PointOS works with either Windows Media Player 10 or 11. Any audio file Windows Media Player will play, can be also be played by PointOS.

NOTE: Because Windows Media Player will not play songs downloaded from iTunes, PointOS will also not play songs from iTunes.

You can rip songs from compact discs that you own, or you can download songs legally from the Internet using sites or services like Napster or Yahoo!

NOTE: In addition to having a legal copy of this song, all locations are also responsible, as with any entertainment, of having the appropriate music licenses (ASCAP, BMI, etc.).

Use the Windows Media Player interface to add or delete songs to your library. You can have WMP automatically search for new music by choosing **File – Add To Library**.

You can create a playlist using Windows Media Player. You must start all playlists to be used in PointOS with a plus sign (i.e., +Happy Hour Music, +Great Mix, +Guitar Rock, etc.).

Once a song is in Windows Media Player, PointOS will automatically add all songs on startup. You can also add songs manually. Refer to the "Update All Music" section in this Manager Manual for more information.

Printing Song Lists

You can print a list of songs to allow your customers to make requests. Refer to the "View Song List" section in this Manager Manual for more information.

Hooking Up To Your Stereo

You can hook the PointOS music system up to your stereo in two ways.

The first is to simply run a wire from the sound output of your computer to the input of your stereo. You can get these wires inexpensively at any electronics store.

The second way is to use a music bridge. This is a hardware device that sends your music digitally to your stereo. There are several options to choose from, but a great one for the money is the Linksys Music Bridge. This uses Wi-Fi or Ethernet cable to send a digital music signal directly to your stereo. It is available online or at many electronics retailers.

Setting Up A Port

Online reporting requires you to set up a port. Complete the following steps:

1. Select the Windows **Start** Menu.
2. Select **Microsoft SQL Server 2005**.
3. Select **Configuration Tools**.
4. Select **SQL Server Configuration Manager**.
5. Expand **SQL Server Network Configuration**.
6. Select **Protocols for SHAKENSOFT**.

The system displays the Protocols in the window on the right.

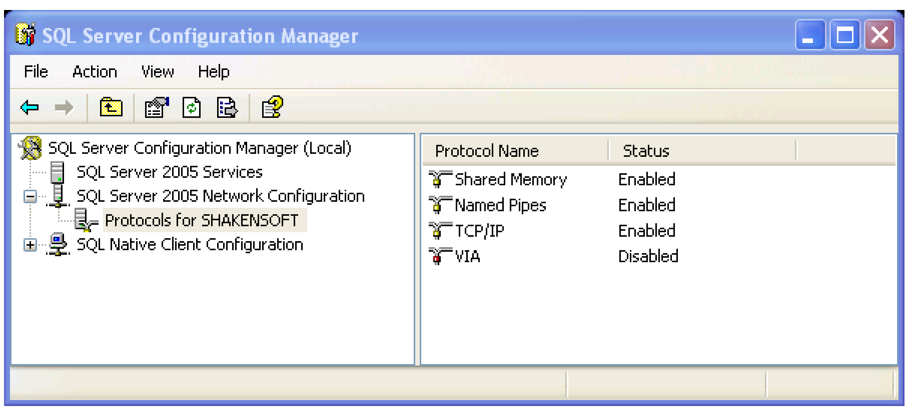


Figure 136: SQL Server Configuration Manager

7. Make sure the TCP/IP protocol is **Enabled**. If not, right click **TCP/IP** and select **Enable**.
8. Right click **TCP/IP** and select **Properties**.

The system opens the TCP/IP Properties dialog box.

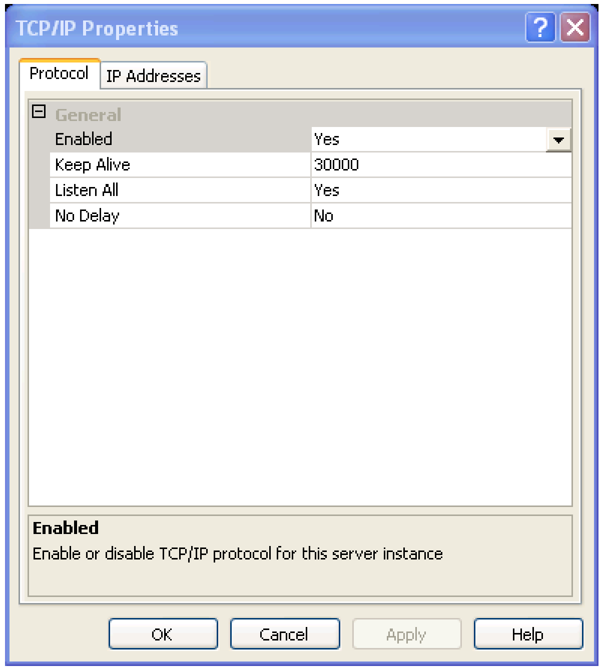


Figure 137: TCP/IP Properties

9. Select the **IP Addresses** tab.
10. Scroll down to the end of the list of properties.

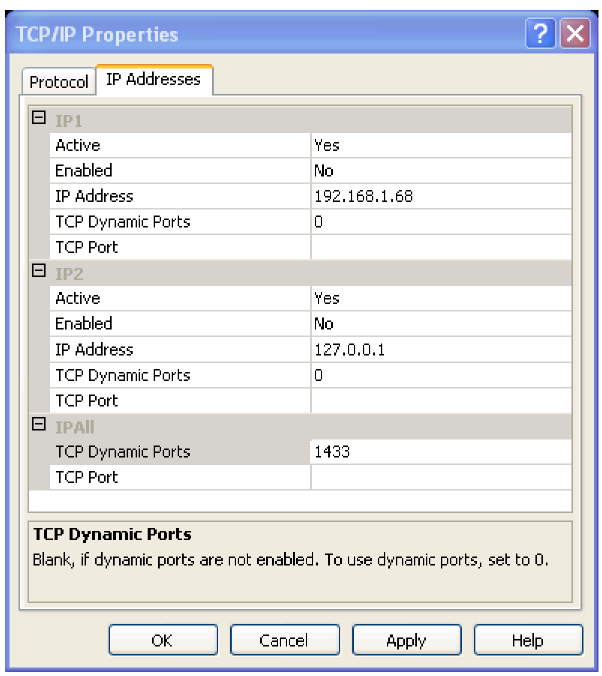


Figure 138: TCP/IP Properties IP Addresses Tab

11. Change the value next to TCP Dynamic Ports to **1433**.
12. Select **OK**.
13. You must restart the SQL Server for the changes to take effect.

Updating PointOS

You can use the PointOS Updater to check for the latest version of PointOS. Refer to the "Check for Update" section in this Manager Manual for more information.

If the Updater fails, you can download the latest version from the PointOS website and reinstall the software. The reinstall will not uninstall SQL. You WILL NOT lose any data.

Troubleshooting

The following table outlines some common problems with PointOS and some possible solutions.

Problem	Possible Solution
The system appears to be running slow.	When the system is running slow, there are several things you can do to speed it up. · Compact the database. Refer to the " Database" section in this Manager Manual for more information. · Archive closed items and orders. Refer to the " Items" section and the " Orders" section in this Manager Manual for more information. · Cleanup unnecessary data. If your database is very large, you can remove data with the Database Cleanup tool. Refer to the " Cleanup" section in this Manager Manual for more information. · Reboot your computer. The system can be setup with auto maintenance to prevent future slowdowns from happening. Refer to the" Database Setup" section in this Manager Manual for more information.
Some of the pictures on the screen do not appear to line up.	If you are using Windows Vista, make sure your font DPI is set to 96 DPI.
PointOS is only taking up part of the screen.	The screen resolution must be set to 800 x 600. Refer to Windows Help for more information.
The task bar is covering some of the controls, like music.	The Windows Task Bar should be set to auto hide. Refer to Windows Help for more information.
I cannot back up the database.	To run a backup of the database, you must be running the Server portion of PointOS Professional. The backup can only be done from the computer that holds the database you are trying to backup. Refer to the "Backup Database" section in this Manager Manual for more information.

Problem	Possible Solution
The cash drawer won't pop.	First check your cables and then make sure your printer is turned on, has paper, and a ribbon or ink. If the cash drawer still doesn't pop, the printer may not be setup with the correct model. Refer to the "Station Settings" section in this Manager Manual for more information on setting up the printer.
The receipt is not printing correctly; the text is breaking to another line.	The print width might not be set correctly. Refer to the "Station Settings" section in this Manager Manual for more information.
Reports are taking a very long time to run.	Some reports are going through a lot of data, and do take a very long time. This may be normal. However, you can speed this up by archiving orders and items prior to running these reports. Refer to the "Database Cleanup" section, the "Archive Items" section, and the "Archive Orders" section in this Manager Manual for more information.
I need to recover from a backup database.	To recover a backup database, go to the Manager Dashboard, and choose **Select Database**. When the system displays the database selection window, you can choose the appropriate backup file. PointOS database files end in .bak. Refer to the "Restore Database" section in this Manager Manual for more information.
I want to move my database to a new computer.	To move your database to a new computer, you will need to first perform a database backup from the computer where the database is located. Then copy the .bak and .ldf files that are usually located in the PointOS Database/Backup folder to your new computer using a shared network driver, cd, or flash drive. Once the database has been copied to the new computer, you will use the Restore Database feature. Refer to the "Restore Database" section in this Manager Manual for more information.
I have multiple stations sharing one database, and I cannot get them to recognize the database when I select it.	To setup a Windows network to be able to share a PointOS database: · Make sure all computers are on the same workgroup. · Enable file sharing on the database computer and give access rights to all workstations. · Make sure your antivirus program or firewall is not blocking your computers from seeing SQL Server on the shared database computer. Refer to Windows Help for more information on setting up a Windows network.

List of Figures